

® **DOCLINE 2.0**

Institution Record Manual



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Section 1. A System's Perspective

DOCLINE is the National Library of Medicine (NLM)'s automated interlibrary loan request routing and referral system. The primary purpose of the system is to provide improved document delivery service among libraries within the National Network of Libraries of Medicine (NN/LM).

DOCLINE was started in March of 1985 and the system has gone through numerous revisions, the most significant in 2000, when it transitioned from a Telnet-based to a Web-based system.

We anticipate continued revisions of the system, both as new information technologies emerge and the needs of library users evolve. Below is a list of DOCLINE versions to date released by NLM:

DOCLINE	first launched via Telnet	Mar 1985
DOCLINE 1.0	introduced to the Web	Jun 2000
DOCLINE 1.3		Sep 2001
DOCLINE 1.4		Sep 2002
DOCLINE 1.5		Mar 2003
DOCLINE 1.5.1		Apr 2003
DOCLINE 1.6		Jun 2003
DOCLINE 2.0	Web redesign	Dec 2003

The DOCLINE system serves over 3,000 U.S. and Canadian medical libraries at no cost.

Section 2. Log in to DOCLINE



Notes:

- If you forget the UserID and/or Password, contact your DOCLINE Coordinator.
- NLM only offers support to the following Web browsers:
 - Internet Explorer 6.x
 - Internet Explorer 5.5 SP2
 - Netscape 7

STEP	ACTION: Log in
1	Bring up System Login URL (wwwcf.nlm.nih.gov/DOCLINE/index.cfm)
2	Make a Favorite (IE Explorer) or Bookmark (NetScape) for future access.
3	Enter your UserID and Password.

Section 3. Library Identifier

Each institution record in DOCLINE is identified by a unique library identifier called a LIBID.

The LIBID consists of six alphabetic characters. For U.S. and Canadian institutions, it starts with a two-letter US MARC Geographical Code (U.S. State or Canadian Province code), followed by a "U" for U.S. or a "C" for Canada and three unique alphabetic characters.

The LIBID for other countries consists of the first two letters of the Universal Postal Union (UPU) code, followed by the letter "X" and three unique alphabetic characters. *Once a LIBID has been assigned to a library, it cannot be changed.*

Section 4. Finding Institution Record by LIBID

Type in desired LIBID—

The screenshot shows a Microsoft Internet Explorer browser window displaying the DOCLINE website. The address bar shows 'http://docline.gov/docline/login.cfm'. The navigation bar includes links for Home, Requests, Serial Holdings, Institutions (which is highlighted), and Loansome Doc Patrons. Below the navigation bar, there is a search section with three input boxes: LIBID (containing 'MAUMAS'), Institution Name, and Contact Name. Each box has a 'SEARCH' button below it. A 'More Search Options' link is also present. At the bottom of the search results, there is a result for 'MAUMAS' from the 'University of Massachusetts Medical Center :: The Lamar Soutter Library/ ILL DEPT.'.

STEP	ACTION: Find Institution by LIBID
1	On the DOCLINE navigation bar, select Institutions
2	In the LIBID input box, enter a complete or partial LIBID
3	Click Enter –or-- click Search
View	The institutional record(s) displayed that match your search criteria, sorted by LIBID.

Section 4. Finding Institution Record by LIBID -[cont'd]



Tip: To retrieve multiple institution records simultaneously, enter complete LIBIDs followed by a space or a comma.



Example: To view Institution records for the University of New Hampshire type in LIBID's --

The screenshot shows the DOCLINE web application running in Microsoft Internet Explorer. The browser's address bar displays the URL <http://docline.gov/docline/login.cfm>. The DOCLINE logo is at the top left, and navigation links (Home, Requests, Serial Holdings, Institutions, Loansome Doc Patrons) are at the top right. Below the navigation bar is a search section with the heading "Search" and the instruction "Enter keyword(s) in one of the boxes below." There are three search boxes: "LIBID" (containing "NHUUHA, NHUIVS"), "Institution Name", and "Contact Name". Each box has a yellow "SEARCH" button below it. A "More Search Options" link with a double arrow icon is located below the search boxes. At the bottom of the page, there is a section for "MAUMAS" (University of Massachusetts Medical Center) with the text "The Lamar Soutter Library/ ILL DEPT."

Section 5 Finding Institution Record by Institution Name

When searching by the Institution (or Library) Name, all three names in the Institution, Document Delivery, and Billing Address fields are searched.



Example: To search for the Institution record of the "Lamar Soutter Library", type in Institution Name –

A screenshot of a web browser window displaying the DOCLINE search interface. The browser is Microsoft Internet Explorer. The address bar shows 'http://docline.gov/docline/login.cfm'. The DOCLINE logo is at the top left, and navigation links (Home, Requests, Serial Holdings, Institutions, Loansome Doc Patrons) are at the top. Below the navigation bar, there are three search input boxes: 'LIBID', 'Institution Name', and 'Contact Name'. The 'Institution Name' box contains the text 'LAMAR SOUTTER'. Each box has a 'SEARCH' button below it. A 'More Search Options' link is also visible. At the bottom, there is a MAUMAS logo and text: 'University of Massachusetts Medical Center :: The Lamar Soutter Library/ ILL DEPT.'.

STEP	ACTION: Find Institution by Name
1	On the DOCLINE navigation bar, select Institutions .
2	In the Institution Name input box, enter keywords from the institution name.
3	Click Enter –or-- click Search .

Section 5 Find Record by Institution Name -[cont'd]



Tip: To perform a truncated search, enter an asterisk (*) at the beginning or end of a word.

To perform a phrase search, enter the search terms within double quotation marks.

Examples: V* AFFAIR*
*FIELD
"MEMORIAL LIBRARY"



Example: To search for a library in New England with "Memorial" as a portion of the library name, create two separate search criteria lines --

Click **Search** and you should arrive with 49 results. Click the name link of your selection.

Section 6 Finding Institution Record by Contact Name

Type in desired contact name –

The screenshot shows the DOCLINE web interface in a Microsoft Internet Explorer browser window. The address bar shows 'http://docline.gov/docline/login.cfm'. The navigation bar includes links for Home, Requests, Serial Holdings, Institutions (selected), and Loansome Doc Patrons. Below the navigation bar, there is a search section with three input boxes: LIBID, Institution Name, and Contact Name. The Contact Name box contains the text 'PAT JOYCE'. Each input box has a yellow 'SEARCH' button below it. A 'More Search Options' link is also visible. At the bottom, there is a logo for NLM and text indicating the user is logged in as 'MAUMAS' from the University of Massachusetts Medical Center.

Contact names are stored as first name, middle name, last name in the database. Phrase searching should be limited to search only one part of the name, e.g. search "Mary Beth", not "Jane Smith".

STEP	ACTION: Find Institution by Contact
1	On the DOCLINE navigation bar, select Institutions .
2	In the Contact Name input box, enter one or more words from the person's name.
3	Click Enter –or– Search .
View	A list of institutions matching your search criteria display sorted by institution name.



Tip: To perform a truncation search, enter an asterisk (*) at the beginning or end of a word.

(MICH*, *STEIN)

Section 6 Find Institution Record by Contact -[cont'd]



Example: To search for a library in New England with "Ruthann" as a portion of the contact name --

The screenshot shows the DOCLINE web application running in Microsoft Internet Explorer. The browser's address bar displays `http://docline.gov/docline/login.cfm`. The DOCLINE logo is at the top left, and navigation links (Help, FAQ, Contact Us, Preferences, Log Out) are at the top right. Below the logo is a horizontal menu with tabs: Home, Requests, Serial Holdings, Institutions (selected), Loansome Doc Patrons, Search, Add, Manage Users, Manage Groups, and Update MAUMAS. The main content area is titled "Search" and contains the instruction "Enter keyword(s) in one of the boxes below." There are three search boxes: "LIBID", "Institution Name", and "Contact Name". The "Contact Name" box contains the text "RUTHANN". Each box has a yellow "SEARCH" button below it. Below the search boxes is a link "More Search Options" with a double arrow icon. At the bottom, there is a section for "MAUMAS" (University of Massachusetts Medical Center) with a logo and text. The browser's status bar at the bottom shows the URL `http://docline.gov/docline/institution/search/quickSearch.cfm#`.

Section 7 Finding Institutions by Multiple Search Criteria

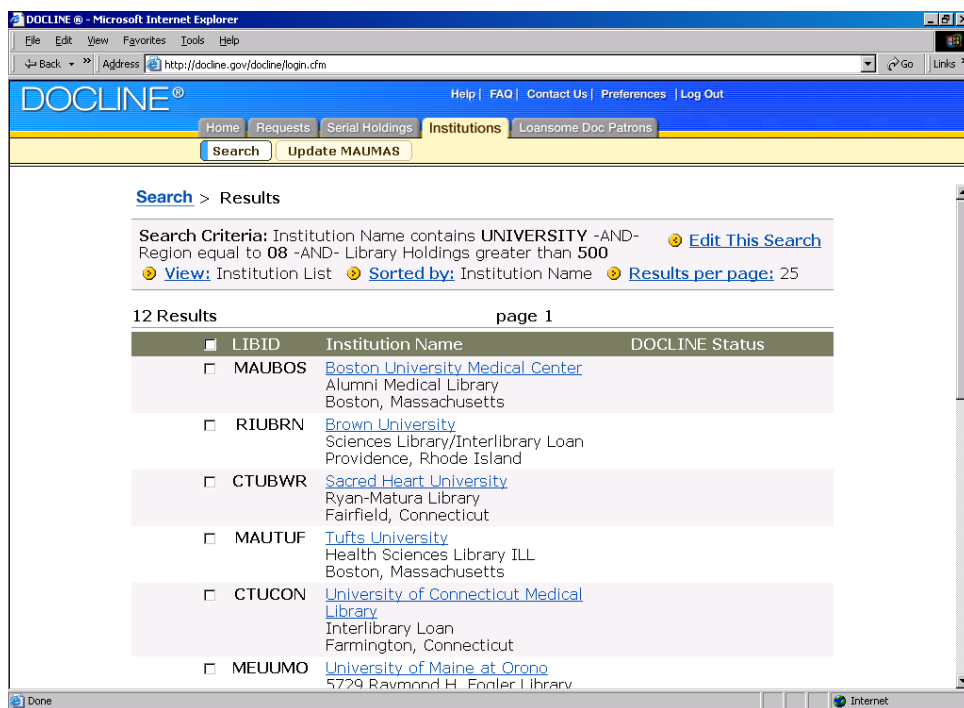
STEP	ACTION: Find Institution by Multiple Criteria
1	On the DOCLINE navigation bar, select Institutions .
2	Select More Search Options .
3	(Optional) To query a specific field in the institution record: <ol style="list-style-type: none"> Select the desired <i>Search Field</i> to query Select or enter search term (e.g. Contains, Equal to, Begins with, etc.) Note: Depending upon the <i>Search Field</i> selected, select from a drop-down list (e.g. Library Group or State/Province) –or– type in value (e.g. City or OCLC code). Click Add to Search.



Example: Using *SearchBuilder*, search for academic institutions (universities) in New England with serial holdings in excess of 500 titles –

Section 7 Find Institutions by Multiple Criteria -[cont'd]

The search produced 12 results –



Check off selections and click on yellow Action buttons –

DOCLINE 2.0 - Microsoft Internet Explorer

Address: http://docline.gov/docline/login.cfm

DOCLINE® Help | FAQ | Contact Us | Preferences | Log Out

Home | Requests | Serial Holdings | **Institutions** | Loansome Doc Patrons

Search | Update MAUMAS

☐ RIORNI [University of Rhode Island](#)
Library ILL
Kingston, Rhode Island

☐ MEUJSO [University of Southern Maine](#)
Glickman Family Library
Portland, Maine

☐ VTUVER [University of Vermont](#)
Dana Medical Library - ILL Dept.
Burlington, Vermont

☐ CTUYAL [Yale University](#)
Cushing/Whitney Medical Library
Document Delivery Office
New Haven, Connecticut

[Select All](#) [Clear All](#)

12 Results page 1

Actions for Selected Institutions		View Options	
<input type="button" value="Print"/>	<input type="button" value="Add to Routing Table"/>	View: <input type="text" value="Institution List"/>	
<input type="button" value="Download"/>	<input type="button" value="Add to M/A/N Map"/>	Sorted by: <input type="text" value="Institution"/>	
		Results per page: <input type="text" value="25"/>	<input type="button" value="REFRESH"/>

MAUMAS
University of Massachusetts Medical Center :: The Lamar Soutter Library/ ILL DEPT.

Section 7 Finding Institutions by Multiple Criteria - [cont'd]

STEP	ACTION: Find Institution by Multiple Criteria + Filters
1	On the DOCLINE navigation bar, select Institutions .
2	Select More Search Options .
3	(Optional) To query a specific field in the institution record: <ol style="list-style-type: none"> Select the desired <i>Search Field</i> to query Select or enter search term (e.g. Contains, Equal to, Begins with, etc.) Note: Depending upon the <i>Search Field</i> selected, select from a drop-down list (e.g. Library Group or State/Province) –or– type in value (e.g. City or OCLC code). Click Add to Search.
4	(Optional) To search additional fields, select the Boolean operator, repeat Step 3.
5	(Optional) To limit your search results <ol style="list-style-type: none"> Click any of the buttons in the <i>Filters</i> box (Delivery Methods, Membership Information, or Services) Select the search limits to apply to the search Click Add to Search.
6	Click Search .

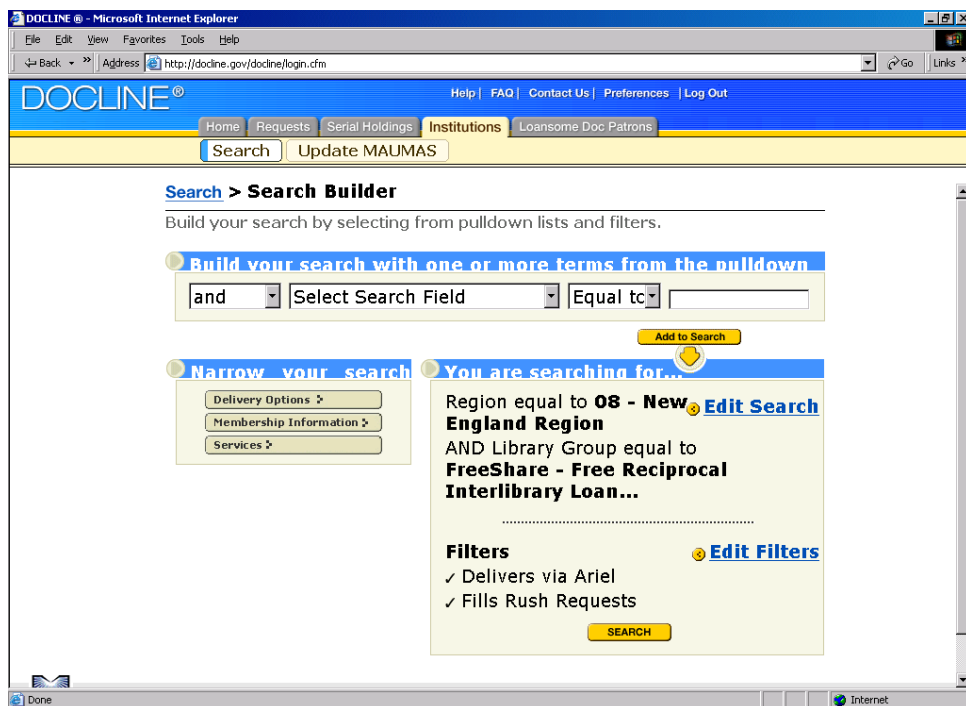
In addition to a host of search criteria, the *SearchBuilder* tool provides a number of filters to narrow your search.



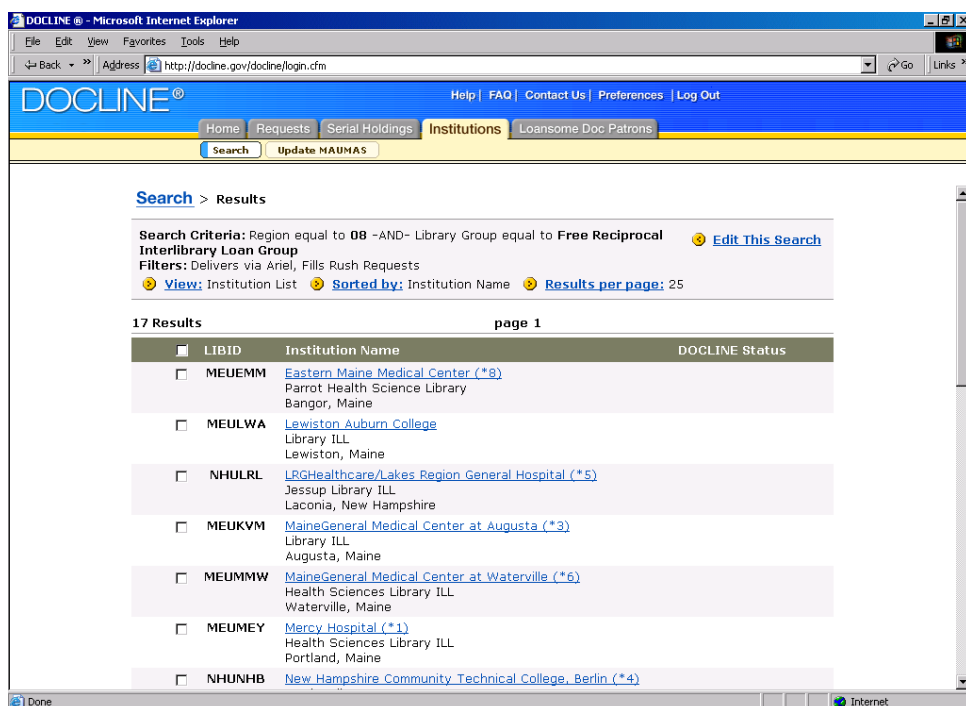
Example: Using *SearchBuilder*, search for Institutions in New England that participate in FreeShare and provide RUSH requests using Ariel --

Section 7 Finding Institutions by Multiple Criteria - [cont'd]

Using *SearchBuilder*, search for institutions in New England that participate in FreeShare and will deliver RUSH requests using Ariel –



This search yielded 17 results –



Section 8 Changing View Option for Search Results

STEP	ACTION: Change View Option
1	On the Search Results page, click the View link in the search criteria display area.
View	The Search Results page is repositioned to display the <i>View Options</i> area.
2	Select the data element for sorting the display from the <i>Sort</i> drop-down list..
3	Click Refresh .

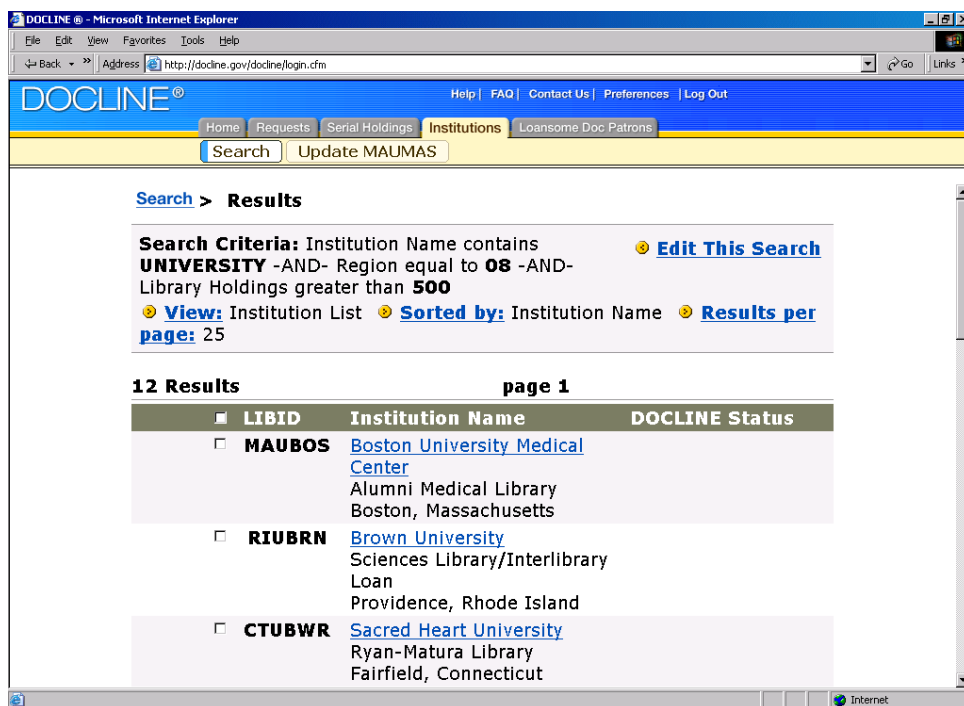


Example: For the search results from the previous page, change the view option **from** "Institution List" (default) **to** "Contact / People" –

Section 8 Changing View Option

-[cont'd]

Click **View** (at the top of the screen) –



Click drop-down list arrow for **View** (at the bottom of the screen) –

The screenshot shows the DOCLINE 2.0 web application running in Microsoft Internet Explorer. The browser's address bar displays <http://docline.gov/docline/login.cfm>. The DOCLINE logo is at the top left, with navigation links for Help, FAQ, Contact Us, Preferences, and Log Out. Below the logo is a menu bar with Home, Requests, Serial Holdings, Institutions (selected), and Loansome Doc Patrons. A search bar and an 'Update MAUMAS' button are also present.

The main content area displays a list of institutions. The first entry is 'CTUYAL' (Yale University) with the address: 'Burlington, Vermont', 'Cushing/Whitney Medical Library Document Delivery Office', and 'New Haven, Connecticut'. Below the list are links for 'Select All' and 'Clear All'.

Below the institution list, it shows '12 Results' and 'page 1'. There are two main sections: 'Actions for Selected Institutions' and 'View Options'.

Actions for Selected Institutions:

- Print
- Add to Routing Table
- Download
- Add to M/A/N Map

View Options:

- View:** Institution List
- Sorted by:** Address
- Results per page:** Complete Record
- Results per page:** Contact/People (highlighted)
- Results per page:** Institution List
- Results per page:** Interlibrary Loan Services

A 'REFRESH' button is located to the right of the 'View Options' section.

At the bottom, the MAUMAS logo is displayed, followed by the text: 'University of Massachusetts Medical Center :: The Lamar Soutter Library/ ILL DEPT.'.

Section 9 Changing Sort Order for Search Results

STEP	ACTION: Change Sort Order
1	On the Search Results page, click the View link in the search criteria display area.
View	The Search Results page is repositioned to display the <i>View Options</i> area.
2	Select one of the five categories of information to display from the <i>View</i> drop-down list. Address: Displays institution, document delivery, and billing address Contact/People: Displays all of the institution's staff contact information Institution List: Displays a list of the institutions with name, city, and state/province. Interlibrary Loan: Displays details of the institution's ILL services and costs Services: Displays a summary of the institution's offered ILL, Loansome Doc, and other services recorded in their institution record.
3	Click Refresh .



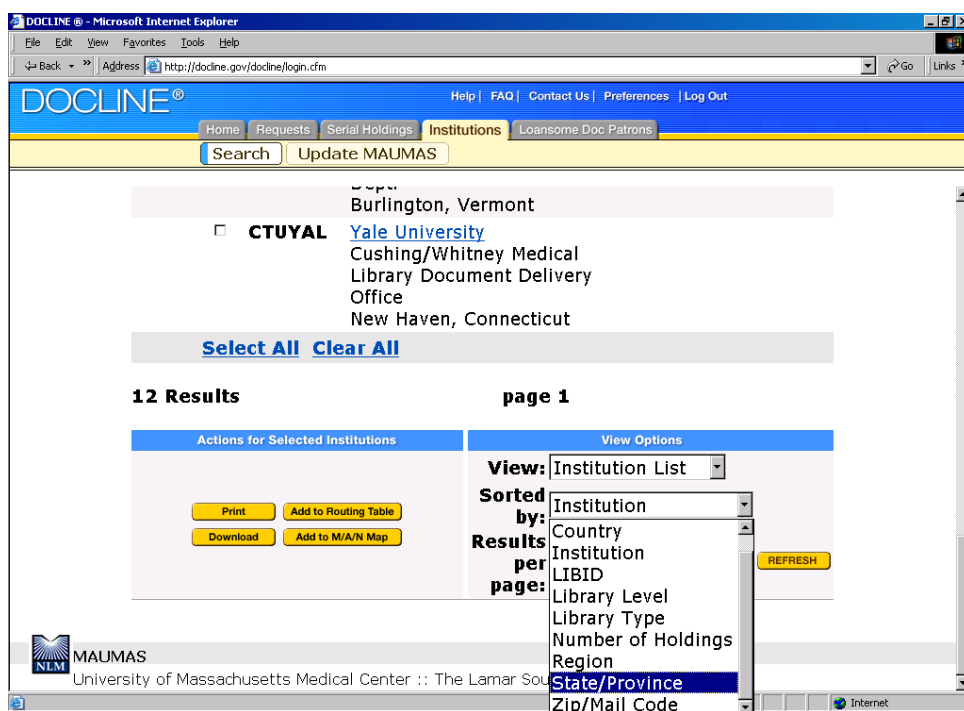
Example: For the current set of search, you've decided to change the sort order **from** "Institution" (default) **to** "State/Province" --

Section 9 Changing the Sort Order -[cont'd]

Click **Sorted by** (at the top of the screen) –



Click drop-down list arrow for **Sorted by** (at the bottom of the screen) –



Section 10 Changing # of Records Displayed per Page

STEP	ACTION: Change Number Records Displayed Per Page
1	On the Search Results page, click the View link in the search criteria display area.
View	The Search Results page is repositioned to display the <i>View Options</i> area.
2	Select the number of institutions to display from the <i>Results per page</i> drop-down list.
3	Click Refresh .



Notes:

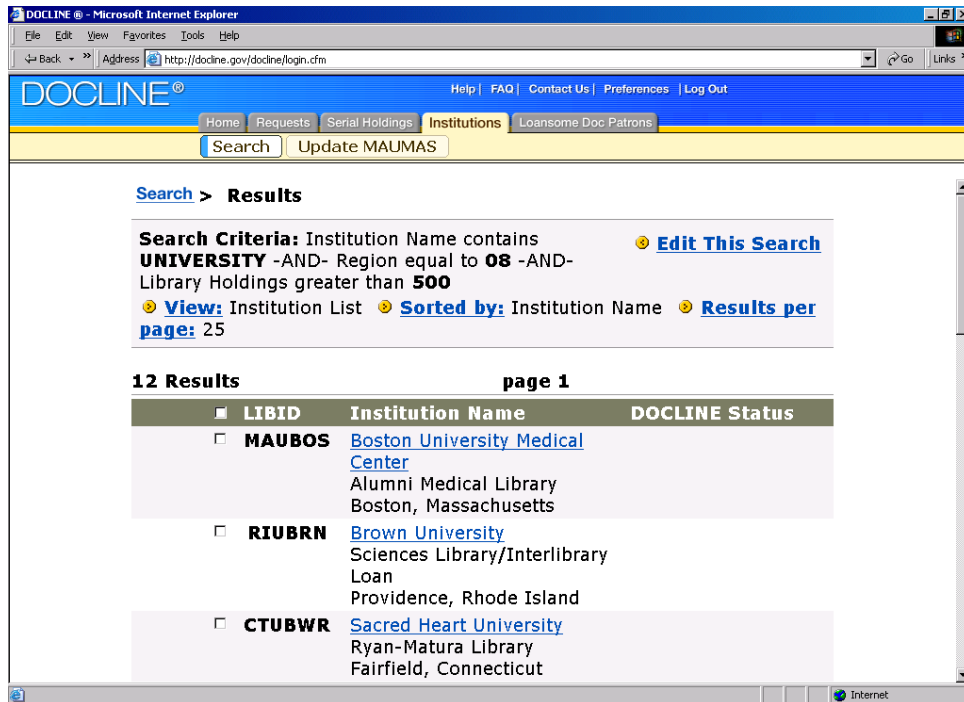
- The options listed in the number of records list are linked to the View selected.
- Views that contain large amounts of data will allow fewer displays of records.



Example: For the current search, suppose you want to print out all of the results on a single sheet of paper, changing the number of records displayed per page **from** "25" (default) **to** "50" --

Section 10 Changing No. Records Displayed - [cont'd]

Click **Sorted by** (at the top of the screen) –



Click drop-down list arrow for **Results per page** (at the bottom of the screen) –

DOCLINE 2.0 Manuals

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Institution Record

DOCLINE 2.0

Home | Requests | Serial Holdings | **Institutions** | Loansome Doc Patrons

Search Update MAUMAS

Burlington, Vermont

☐ **CTUYAL** [Yale University](#)
Cushing/Whitney Medical
Library Document Delivery
Office
New Haven, Connecticut

Select All Clear All

12 Results page 1

Actions for Selected Institutions

Print Add to Routing Table
Download Add to M/A/N Map

View Options

View: Institution List
Sorted by: Institution
Results per page: 25 REFRESH

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Section 11 Modifying Your Search Query

STEP	ACTION: Modify Search Query
1	On the Search Results page, click Edit This Search in the search criteria display area.
View	Your current search query is displayed on the Edit your search page.
2	You can modify your search query by: Selecting a different Search Field and / or modifying the search term Add additional criteria by clicking Add Another Line Remove criteria by clicking delete to remove an entry.
3	To modify your search filters, click Edit Filters Select or deselect any criteria to modify your search filters Click Add to Search .
4	Click Search .



Example: You begin a search for Arielists in New England that are Full members of the NN/LM network –

DOCLINE @ - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address http://docline.gov/docline/login.cfm

DOCLINE® Help | FAQ | Contact Us | Preferences | Log Out

Home Requests Serial Holdings Institutions Loansome Doc Patrons

Search Update MAUMAS

Search > Search Builder

Build your search by selecting from pulldown lists and filters.

1 Build your search with one or more terms from the pulldown

Region Equal to 08 - New England Region

Add to Search

2 Narrow your search

Delivery Options > Membership Information > Services >

3 You are searching for...

No search terms entered.

Filters

- ✓ Full Member
- ✓ Delivers via Ariel

Edit Filters

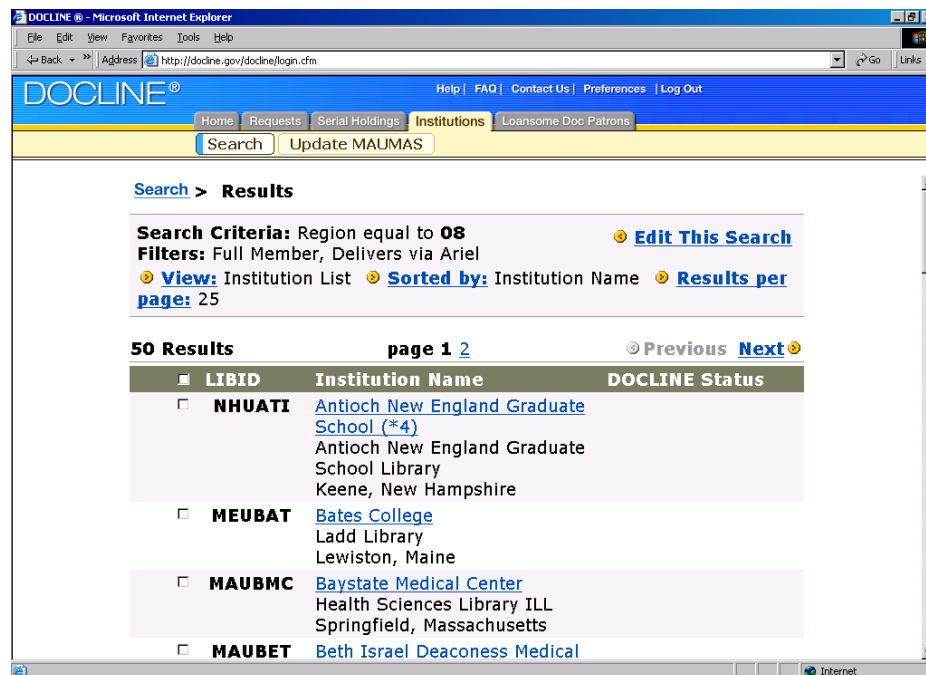
SEARCH

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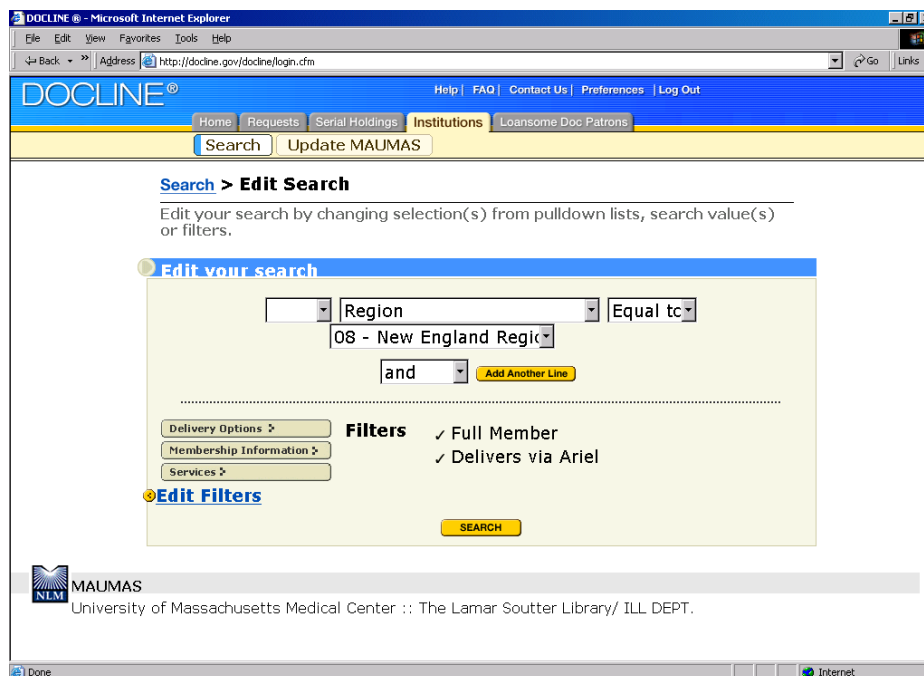
Internet

Section 11 Modifying Your Search Query -[cont'd]

The search produces too many results (50) --

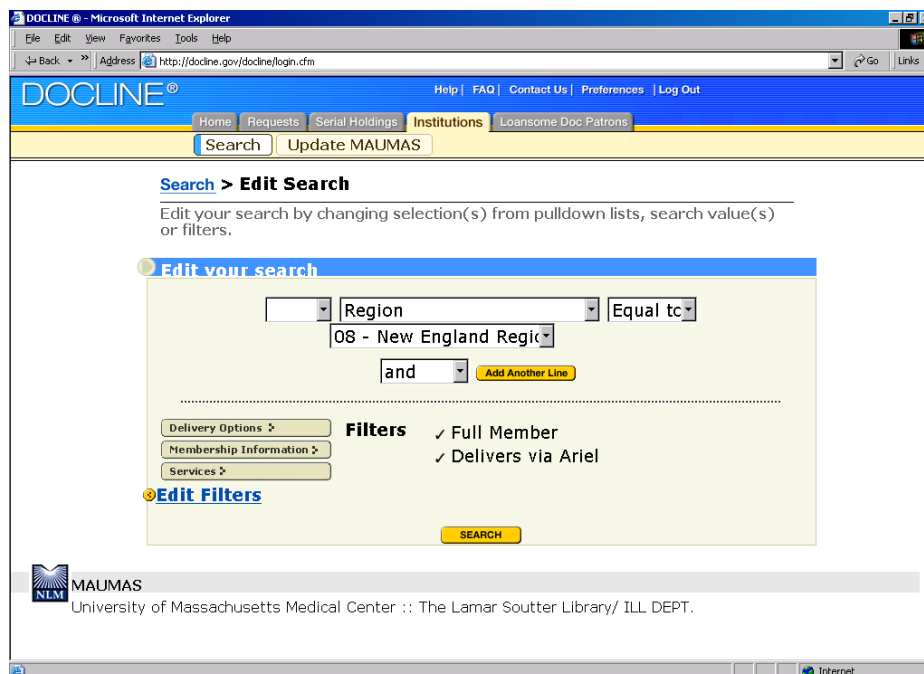


So you decide to modify the search to "fine tune" the results, by clicking "Edit This Search" link (upper right corner of screen) --



Section 11 Modifying Your Search Query -[cont'd]

Now you click the blue "Edit Filters" link (at the lower left corner of the screen) –



Check "Hospital" filters checkbox, under **Library Type** and click **Add to Search** –

DOCLINE @ - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address http://docline.gov/docline/login.cfm

DOCLINE® Help | FAQ | Contact Us | Preferences | Log Out

Home | Requests | Serial Holdings | **Institutions** | Loansome Doc Patrons

Search Update MAUMAS

Membership Information

- ☐ Federal Library
- ☐ ISO/ILL Participant
- ☐ Reports Serial Holdings

Library Level

- ☐ Primary Access Library
- ☐ Resource Library
- ☐ Regional Medical Library (RML)
- ☐ Other

Library Type

- ☐ Academic
- ☒ Hospital
- ☐ Public
- ☐ Other

Network Membership

- ☒ Full Member
- ☐ Affiliate Member
- ☐ Non-Member

Interlibrary Loan

- ☐ Fills Rush Requests
- ☐ Provides Color Copies
- ☐ Fills International Requests

Loansome Doc

- ☐ Affiliated Users
- ☐ Public Users
- ☐ Unaffiliated Health Professionals
- ☐ International Library
- ☐ International Users

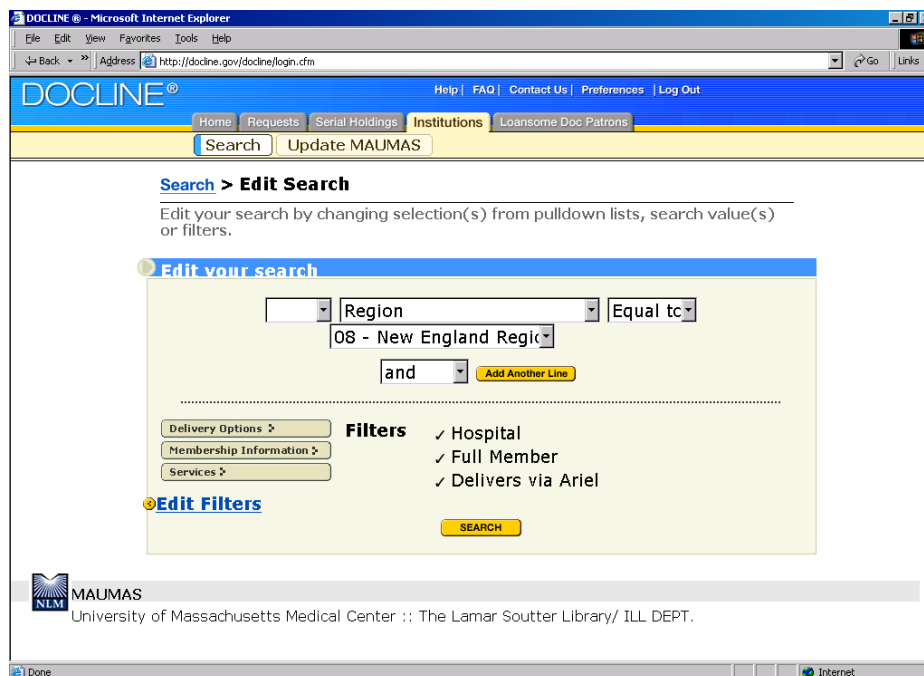
Library Services

- ☐ MEDLINEplus Consumer Health Library
- ☐ Affiliated Users
- ☐ Public Users
- ☐ Unaffiliated Health Professionals

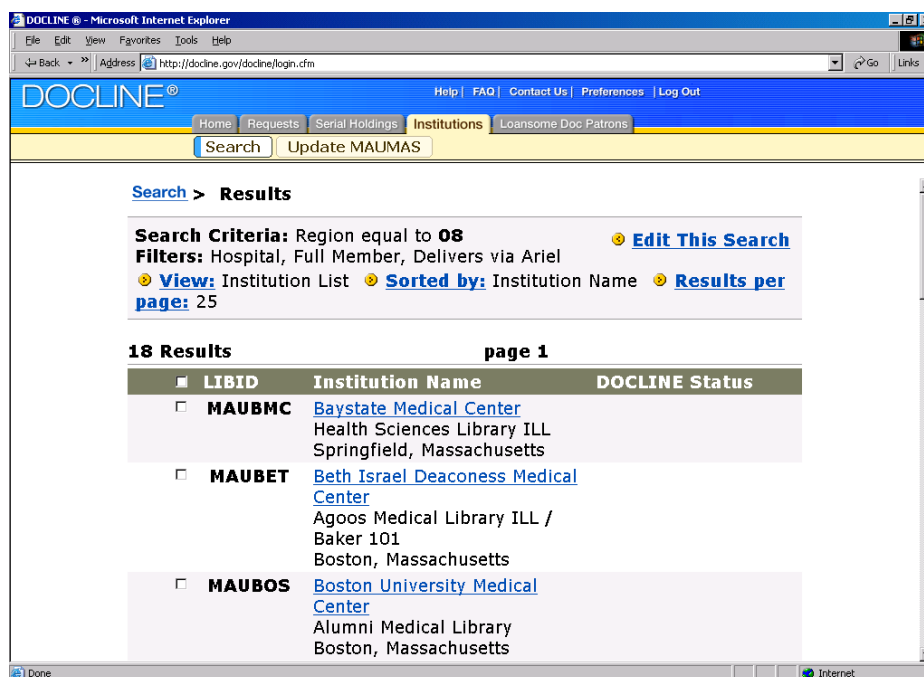
Done Internet

Section 11 Modifying Your Search Query -[cont'd]

You can see the additional filter for "Hospital" has been added to the search strategy –



Click **Search**, and you can see you have narrowed results down to 18 (enough to fit into an open cell in your Routing Table) –



Section 12 Adding Institutions Direct to Routing Table

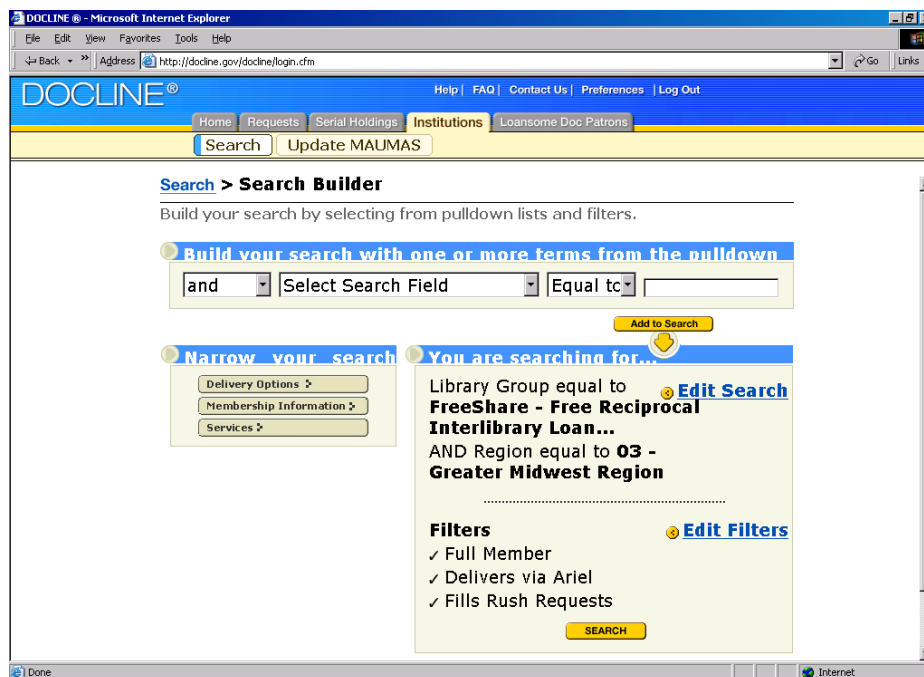
STEP	ACTION: Add Institutions to Routing Table from Search
1	On the Search Results page, select the institutions to be added to your Routing Table by clicking in the check box next to the institution name.
2	Scroll to the bottom of the page to the Actions for Selected Institutions area. Click Add to Routing Table .
View	A confirmation page displays indicating the institutions about to be added to the Routing Table Workspace and any which could not be added and why. For example, non-DOCLINE libraries cannot be added to a Routing Table. The Workspace is a holding area from which libraries can manage their Routing Table.
3	Click Add and Proceed to Routing Table to add the listed institutions to your Workspace and proceed to your Routing Table for updating. – or – Click Add and Return to Results to add the listed institutions to your Workspace and return to your search results. You can continue searching and adding more institutions to the Workspace or proceed to other tasks. You can access your Routing Table at any time by selecting Institutions, then Update <your LIBID> from the DOCLINE navigation bar. The Workspace is retained even if you log out of DOCLINE. -or- Click Cancel to abandon the action.



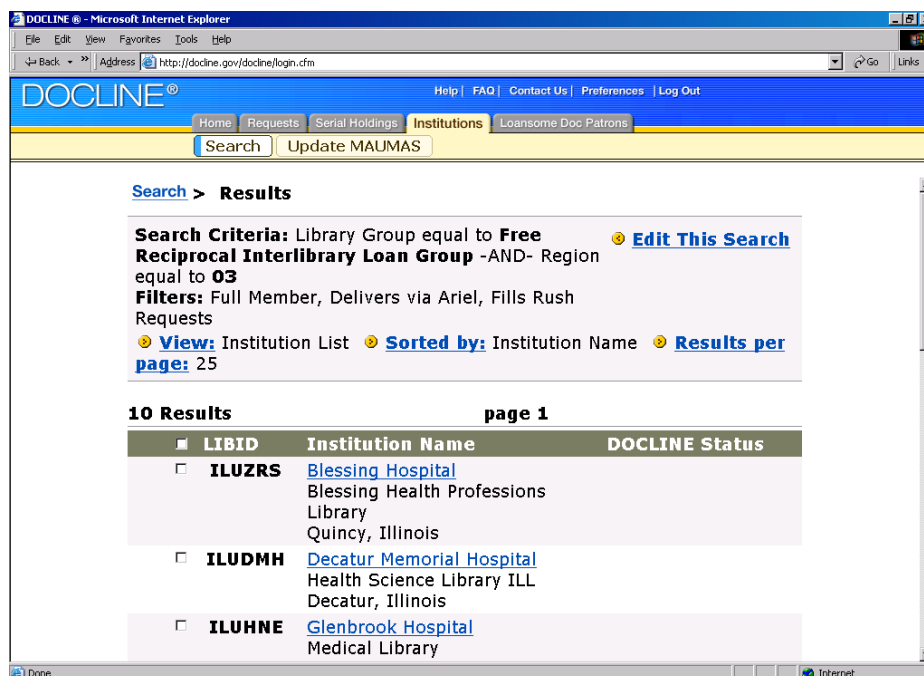
Example: Let's search for **FreeShare** libraries in the **Greater Midwest** states that are members of the **NN/LM** network, will provide **RUSH** requests, and support **Ariel** as a delivery method –

Section 12 Add Institutions Direct to Table -[cont'd]

Our search is comprised of 2 lines of search criteria and 3 filters –

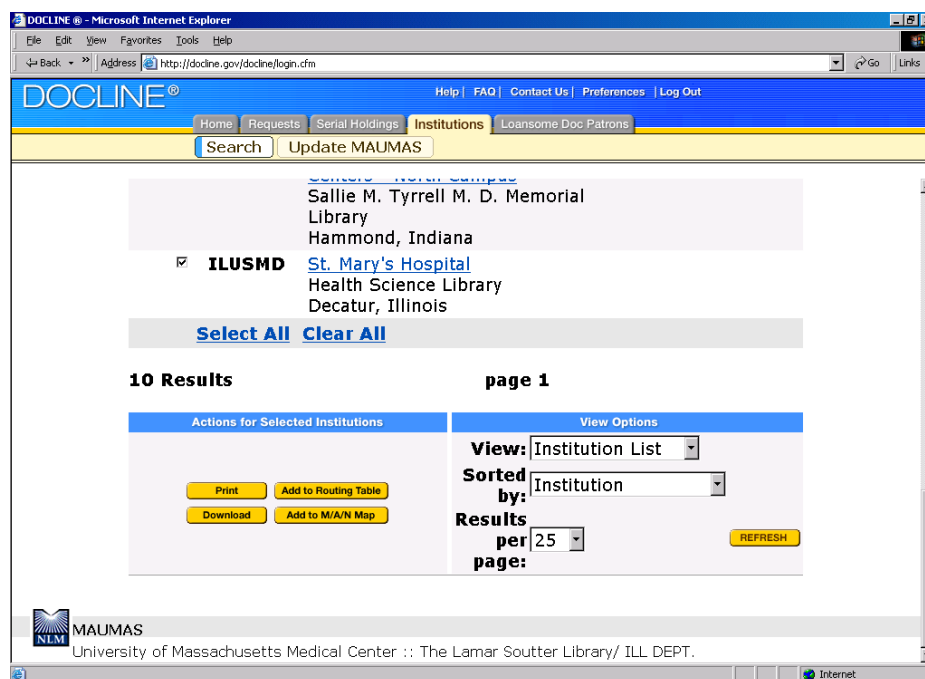


Click **Search**, and we end up with 10 results –

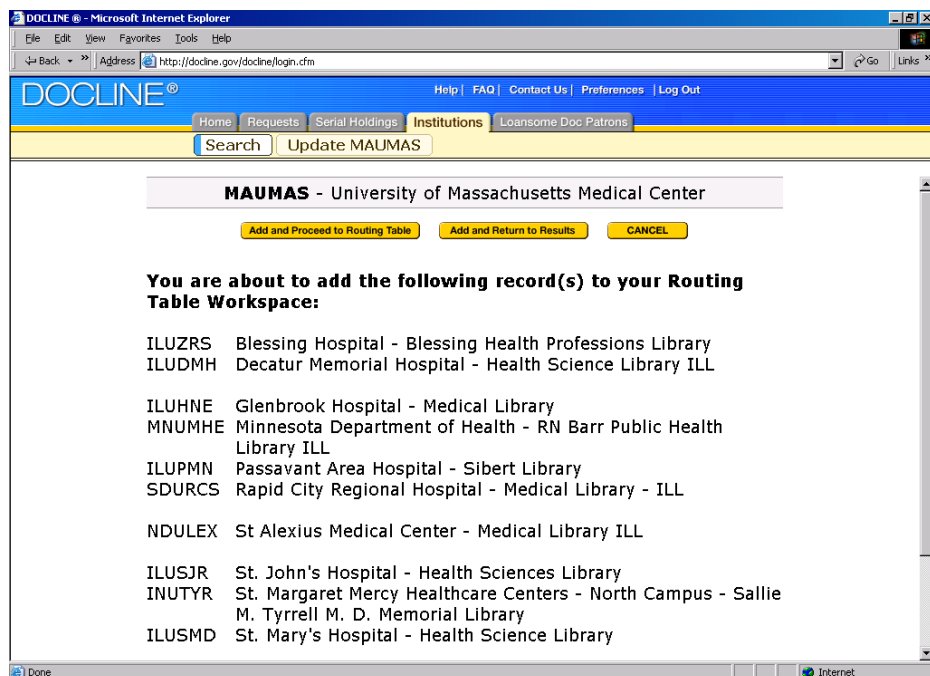


Section 12 Add Institutions Direct to Table -[cont'd]

If we then take our example from the previous page, and click the blue “*Select All*” page link (at the bottom of the list), followed by a click to **Add to Routing Table** —

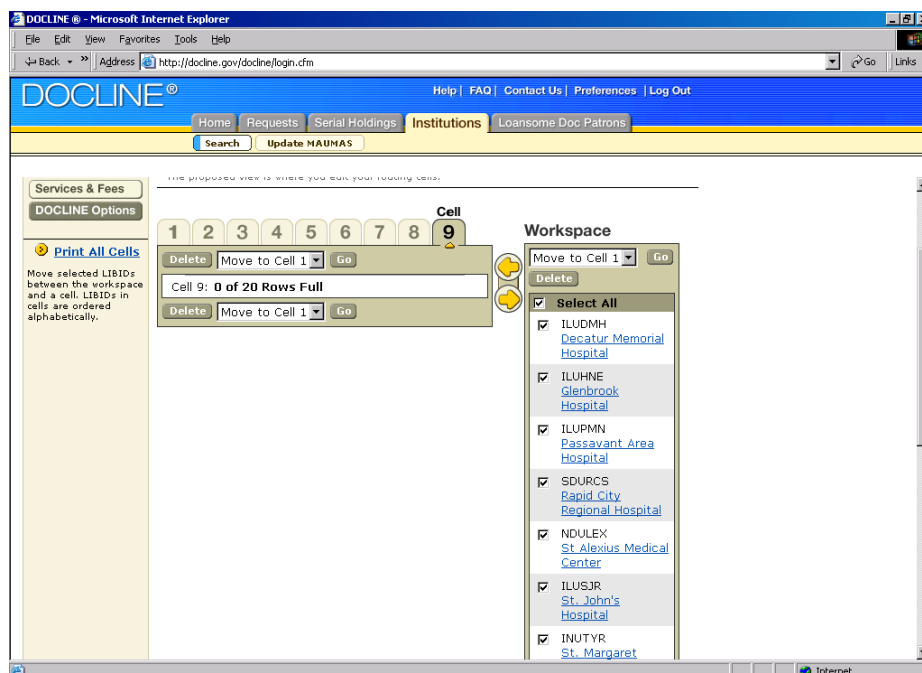


A preview screen pops up, prompting us to verify the selection of records that will be added to the Workspace portion of the Routing Table —

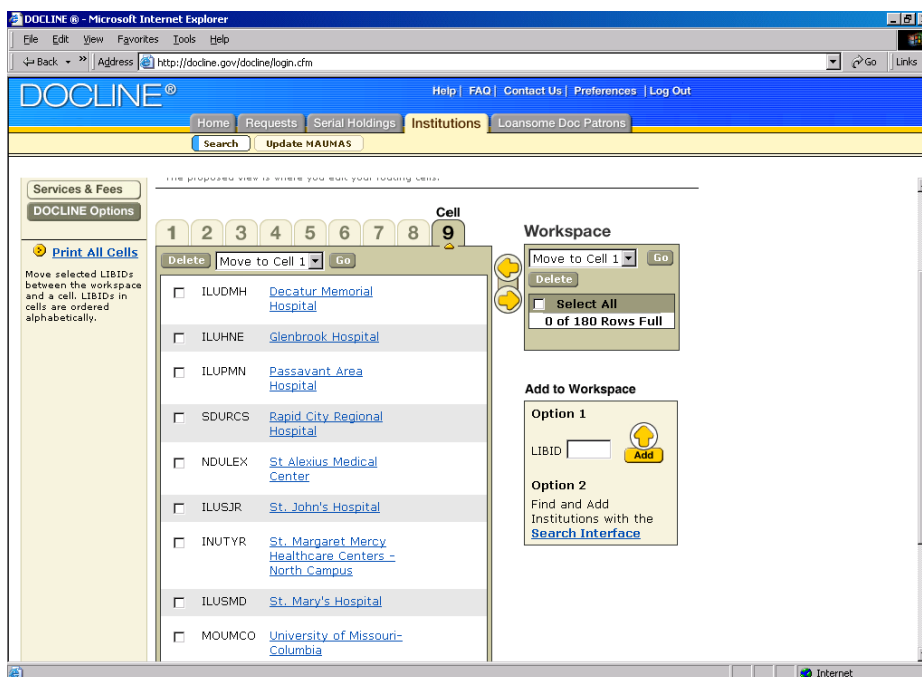


Section 12 Add Institutions Direct to Table -[cont'd]

Click **Add and Proceed to Routing Table** –

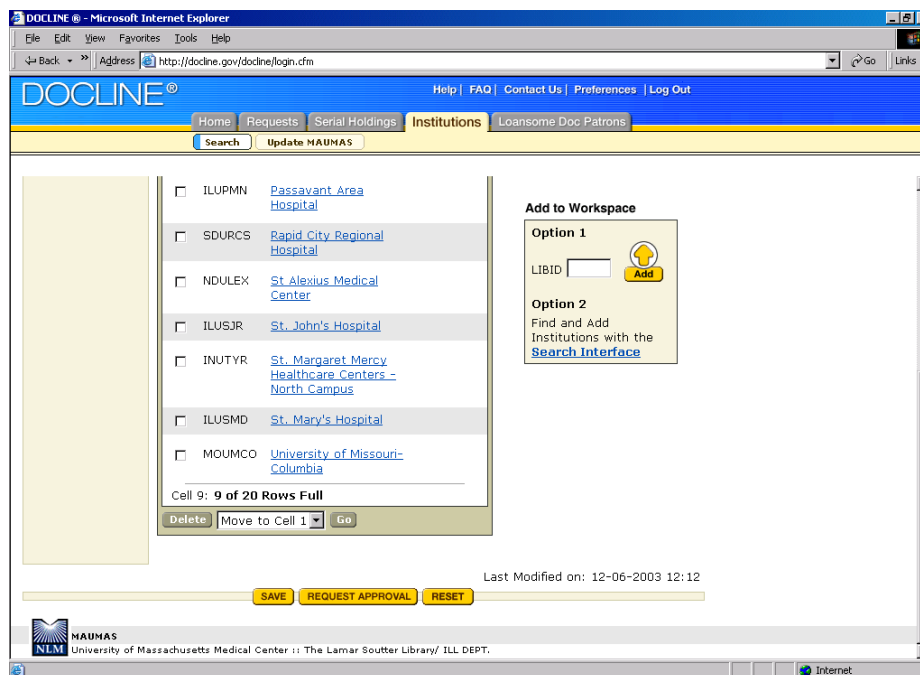


Check **Select All** checkbox in the Workspace box, select a cell (e.g. Cell 9) from the cell tab list, and click the **left yellow arrow** in the Workspace box –

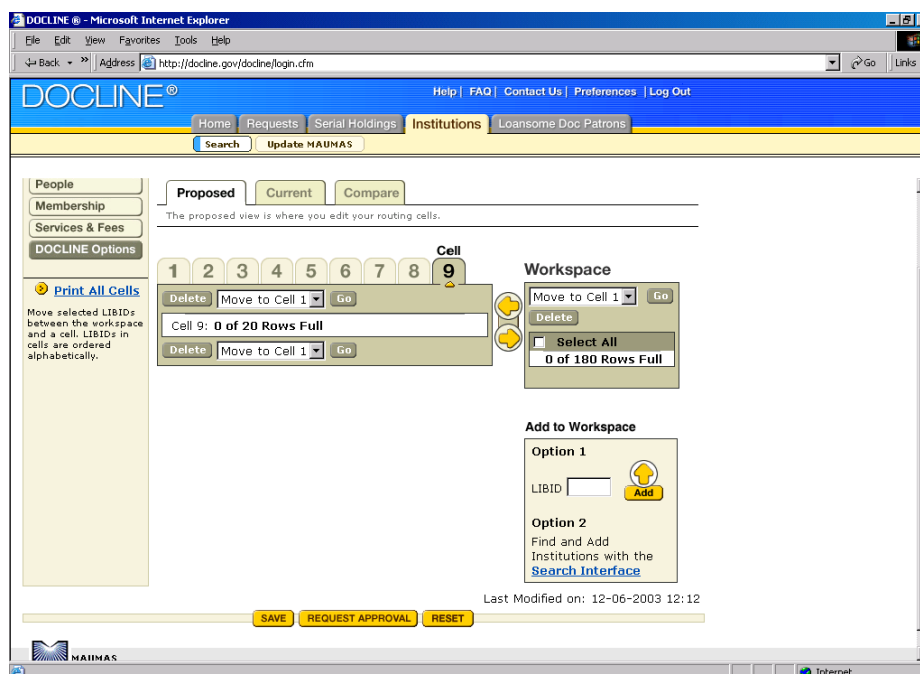


Section 12 Add Institutions Direct to Table -[cont'd]

To incorporate these institutions into the Routing Table, click **Save**. To actually have them “activated” for routing, they still must be approved by your DOCLINE Coordinator for approval. Click **Request Approval** –or– if you change your mind and want to remove them from the Routing Table space, click **Reset** –



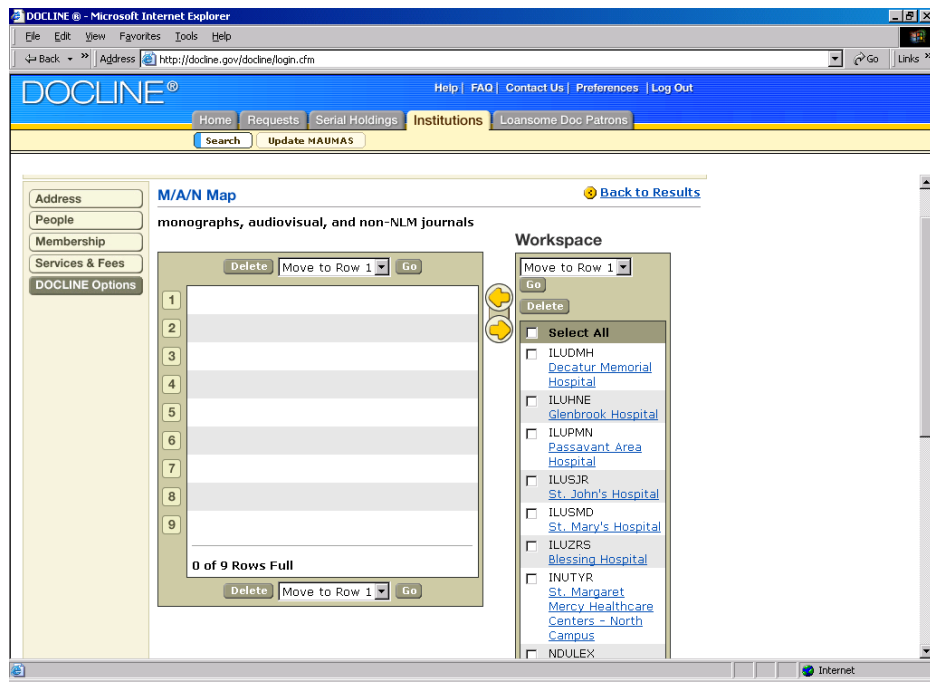
To remove these institutions from the Workspace, click **Select All** and click **Delete** –



Section 13 Adding Institutions Direct to M/A/N Map

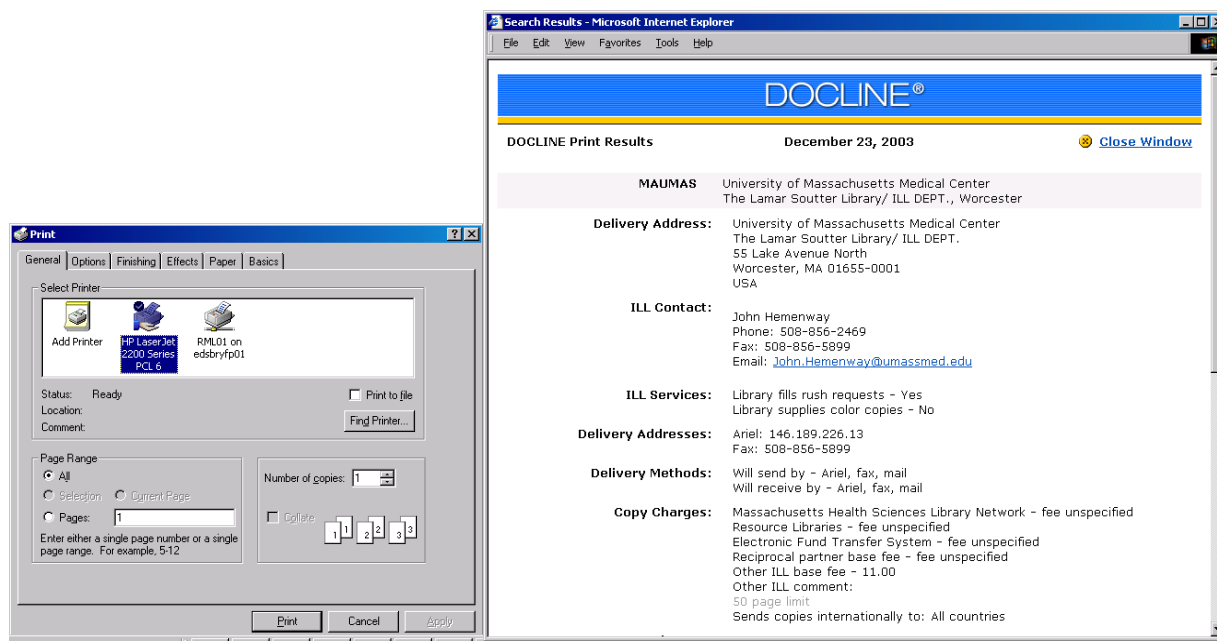
STEP	ACTION: Add Institutions to MAN Map from Search
1	On the Search Results page, select the institutions to be added to your Routing Table by clicking in the check box next to the institution name.
2	Scroll to the bottom of the page to the Actions for Selected Institutions area Click Add to M/A/N Map .
View	A confirmation page displays indicating the institutions about to be added to the Routing Table Workspace and any which could not be added and why. For example, non-DOCLINE libraries cannot be added to a Routing Table. The Workspace is a holding area to manage your Routing Table.
3	Click Add and Proceed to M/A/N Map to add the listed institutions to your Workspace and proceed to your M/A/N Map for updating. -or- Click Add and Return to Results to add the listed institutions to your Workspace and return to your search results. You can continue searching and adding more institutions to the Workspace. You can edit your M/A/N Map at any time by selecting Institutions, then Update <your LIBID> from the DOCLINE navigation bar. The Workspace is retained even if you log out of DOCLINE. -or- Click Cancel to abandon adding institutions to your Routing Table.

The process is the same as adding to the Routing Table, *except* : [a.] clicking **Add to M/A/N Map**; [b.] the M/A/N Map is comprised of a single cell; and [c.] there is no "Approval" process



Section 14 Printing Search Results

STEP	ACTION: Print Search Results
1	On the Search Results page, select the institutions to be printed by clicking in the check box next to the institution name. -or- Select all institutions on the page by clicking the check box in the header bar next to the label LIBID or the clicking Select All at the bottom of the page.
2	Scroll to the bottom of the page to the Actions for Selected Institutions area. Click Print .
View	A new window opens with the selected institutions displayed in the View format of the Search Results page.
3	On the Print dialog window, click Print .
4	Click Close window to close the secondary window.



Section 15 Downloading Search Results



STEP	ACTION: Download Search Results
1	On the "Search Results" page, select the institutions to be downloaded by clicking in the check box next to the institution name . -or- Select all institutions on the page by clicking the check box in the header bar next to the label LIBID —or— by clicking Select All at the bottom of the page.
2	Scroll to the bottom of the page to the Actions for Selected Institutions area. Click Download .
3	On the Download Search Results window, select one of the three information views to download: Institution List Address Contact / People
4	On the "File Download" dialog window, select Save this file to disk and click OK .
5	Choose the location where the file will be saved.
6	Name the file or accept the default name.
7	Click Save .
8	Open the file in Excel and format as desired.

Section 16 Updating Addresses

STEP	ACTION: Update Addresses
1	On the DOCLINE navigation bar, select Institutions .
2	On the DOCLINE sub navigation bar, select Update <LIBID> where <LIBID> is your institution's LIBID.
View	Your library's institution record is displayed. The Address page is displayed.
3	Click in the <i>Institution Address</i> field you wish to edit and make the desired changes.
4	Tab to the next field, or click to any field you wish to edit.
5	Click Save .



Notes:

- The Institution address is used for directory listings (e.g. MEDLINEplus Consumer Health Libraries, NN/LM Member database, etc.) The Institution address should reflect the address of the library, *not* the ILL Department Delivery address.
- The Document Delivery address is the "Ship to:" in DOCLINE which appears on request receipts. The Document Delivery address should reflect the address where articles and books should be mailed.
- The Billing address is the "Bill to:" in DOCLINE which appears on request receipts. The Billing address should reflect the address where invoices for materials filled by lenders should be mailed.
- Your Internet addresses URLs should begin with "**http://**".

DOCLINE 2.0 - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address http://docline.gov/docline/login.cfm

DOCLINE® Help | FAQ | Contact Us | Preferences | Log Out

Home Requests Serial Holdings **Institutions** Loansome Doc Patrons

Search Add Manage Users Manage Groups Update MAUMAS

Update > Address [Back to Results](#)

MAUMAS - University of Massachusetts Medical Center

Address

[Institution](#)
[Document](#)
[Delivery](#)
[Billing](#)
[Address](#)
[Internet](#)
[Addresses](#)

Delivery Info

Will receive

Institution Address required field = *
(DIRECTORY LISTING)

Institution * University of Massachusetts Medical Center

Library The Lamar Soutter Library/ ILL DEPT.

Street * 55 Lake Avenue North

City * Worcester

State/Province : **Massachusetts**

Zip/Mail Code * 01655-0001 US: enter ZIP + 4

Country : **USA**

County Worcester

Phone * 1 508 856-2511

Country Area Number Ext.

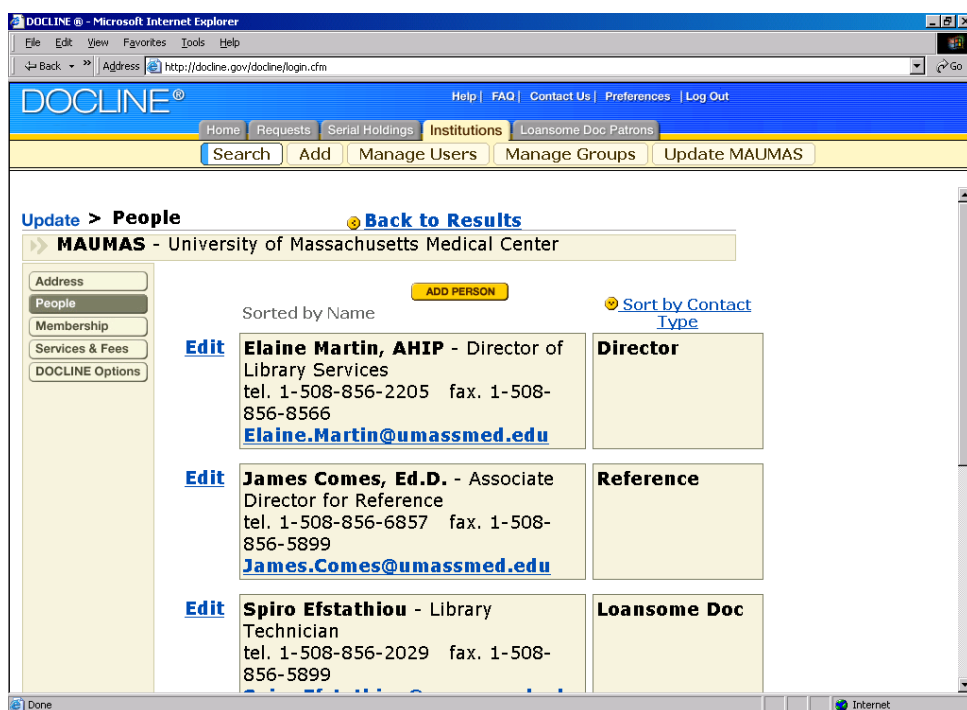
Document Delivery Address (SHIP TO)

Done Internet

Section 17 Updating People (Contacts)

STEP	ACTION: Add People Contacts
1	On the DOCLINE navigation bar, select Institutions .
2	On the DOCLINE sub navigation bar, select Update <LIBID> where <LIBID> is your institution's LIBID.
View	Your library's institution record is displayed.
3	Click People on the Institution Navigation bar.
4	Click Add People .
View	The Add New Contact Person page is displayed.
5	Enter the person's contact info. Fields marked by an asterisk are required.
6	Select role(s) the person performs by checking corresponding Contact Type.
7	Click Save .

Click **People** (in the left column) and either: [a.] click the blue **Edit** page link –or– **Add Person** –



Section 17 Updating People (Contacts) -[cont'd]

STEP	ACTION: Update People Contacts
1	On the DOCLINE navigation bar, select Institutions .
2	On the DOCLINE sub navigation bar, select Update <LIBID> where <LIBID> is your institution's LIBID.
View	Your library's institution record is displayed.
3	Click People on the Institution Navigation bar.
4	Click the Edit link next to the contact to be modified.
View	The contact person's record is displayed.
5	Modify the person's contact information. Fields marked by asterisk required.
6	Modify which role(s) the person performs by checking the corresponding Contact Type.
7	Click Save .

STEP	ACTION: Remove People Contacts
1	On the DOCLINE navigation bar, select Institutions .
2	On the DOCLINE sub navigation bar, select Update <LIBID> where <LIBID> is your institution's LIBID.
View	Your library's institution record is displayed.
3	Click People on the Institution Navigation bar.
4	Click the Edit link next to the contact to be modified.
View	The contact person's record is displayed.
5	Click Delete Person .
6	On the Delete Confirmation page, click Yes . -or- Click Cancel to abandon the action.

Section 18 Managing Import/Export of Serial Holdings

The Membership page includes the data elements that describe an institution's NN/LM and DOCLINE membership. Most of the Membership page fields can only be edited by your regional DOCLINE coordinator or by NLM. To request a change to any of the "read-only" elements -- contact your DOCLINE Coordinator.

To authorize NLM to export your DOCLINE serial holdings data to OCLC, or update your DOCLINE Serial Holdings from imported data, do the following:

STEP	ACTION: Elect Batch Authorization Update
1	On the DOCLINE navigation bar, select Institutions .
2	On the DOCLINE sub navigation bar, select Update <LIBID> where <LIBID> is your institution's LIBID.
View	Your library's institution record is displayed.
3	Click Membership on the Institution Navigation bar.
4	Click Serial Holdings on the Institution Navigation bar. -or- Scroll down to the "Serial Holdings" area.
5	Select one of the options in the Batch Authorization Update list box ▪ ▪ ▪
6	Verify your OCLC Symbol.
7	Click Save .



Notes:

- A single unique OCLC symbol is required when **Send Holdings to OCLC** is selected.
- One or more OCLC symbols are required when **Update Holdings from OCLC** is selected.
- For additional information about Batch Update Authorization programs for Serials, please contact your DOCLINE Coordinator.

Section 18 Managing Import/Export Holdings -[cont'd]

Click **Membership** (from left column) –

The screenshot shows the DOCLINE web interface in Microsoft Internet Explorer. The browser address bar shows <http://docline.gov/docline/login.cfm>. The DOCLINE logo is at the top left, with navigation links: Home, Requests, Serial Holdings, Institutions, Loansome Doc Patrons. Below these are buttons: Search, Add, Manage Users, Manage Groups, Update MAUMAS. The main content area is titled "Update > Membership" and includes a "Back to Results" link and "SAVE" and "RESET" buttons. The institution name is "MAUMAS - University of Massachusetts Medical Center". On the left is a sidebar with a "Membership" button highlighted. The main form is titled "NN/LM Membership" and contains the following fields:

- Region Code: 08 - New England Region
- Library Type: Academic
- Library Level: Regional Medical Library
- NN/LM Membership: Full Member
- Date Joined: MM-DD-YYYY
- Renewal Date: 03-06-2002
- Library Closed: Yes No
- Closed Update Date: MM-DD-YYYY
- Date Library Closed: MM-DD-YYYY
- Merged with LIBID: Yes No
- Federal Library: Yes No
- Library Groups: MAHSLIN, RESOURCE, EFTS

At the bottom of the form are "Add/Delete Groups" and "DOCLINE Membership" sections. The "DOCLINE Membership" section includes:

- DOCLINE Participant: Yes No
- Current DOCLINE Status: Active

Click drop-down arrow list box to select Batch Update Authorization program –

The screenshot shows the DOCLINE web interface in Microsoft Internet Explorer. The browser address bar shows <http://docline.gov/docline/login.cfm>. The DOCLINE logo is at the top left, with navigation links: Home, Requests, Serial Holdings, Institutions, Loansome Doc Patrons. Below these are buttons: Search, Add, Manage Users, Manage Groups, Update MAUMAS. The main content area is titled "Serial Holdings" and contains a table with the following data:

Number of Holdings	Level 2	Level 3	Total
27	5255	5282	

Below the table is an "Update History" section with the following data:

Update History	Type	Update ID	Update Date
Batch	UCMP	02-23-2000	
Online	MAS63	12-18-2003	

Below the table are the following fields:

- Batch Update Authorization: No Authorization Given
- Batch Authorization Date: 01-01-2001
- Holdings Last Reviewed: MM-DD-YYYY

Below these fields is the "Organization ID" section with the following fields:

- Federal Employer Identification Number (FEIN):
- OCLC Symbol 1: WQM
- OCLC Symbol 2:
- OCLC Symbol 3:
- MARC Organization Code:
- ID Comments:

At the bottom of the page is the text "Last Modified on: 11-18-1999 17:11".

Section 19 Reviewing Serial Holdings

DOCLINE participants are required to maintain accurate serial holdings. Libraries can update individual holdings records in DOCLINE, import their holdings from OCLC or a MARC 21 file, or indicate the accuracy of their holdings through an annual review.

To indicate that an institution has reviewed their serial holdings and that they are accurate, do the following:

STEP	ACTION: Record Serial Holdings Reviewed Date
1	On the DOCLINE navigation bar, select Institutions .
2	On the DOCLINE sub navigation bar, select Update <LIBID> where <LIBID> is your institution's LIBID.
View	Your library's institution record is displayed.
3	Click Membership on the Institution Navigation bar.
4	Click Serial Holdings on the Institution Navigation bar. -or- Scroll down to the "Serial Holdings" area.
5	Enter the date on which your institution completed reviewing their serial holdings.
6	Click Save .

Section 20 Modifying Institution IDs (OCLC, FEIN, MARC)

STEP	ACTION: Modify Institution ID'S
1	On the DOCLINE navigation bar, select Institutions .
2	On the DOCLINE sub navigation bar, select Update <LIBID> where <LIBID> is your institution's LIBID.
View	Your library's institution record is displayed.
3	Click Membership on the Institution Navigation bar.
4	Click Organization ID on the Institution Navigation bar. -or- Scroll down to the "Organization ID" area.
5	Click in the organization ID field you wish to edit and make the desired changes.
6	Modify comments explaining IDs.
7	Click Save .

Section 21 Modifying Interlibrary Loan Service Options

STEP	ACTION: Modify ILL Service Options
1	On the DOCLINE navigation bar, select Institutions .
2	On the DOCLINE sub navigation bar, select Update <LIBID> where <LIBID> is your institution's LIBID.
View	Your library's institution record is displayed.
3	Click Services & Fees on the Institution Navigation bar.
4	Modify the ILL services values by clicking the appropriate radio button.
5	Enter comments about your institution's ILL services.
6	Click Save .



Notes:

- To change the "Participates in EFTS" value, contact your DOCLINE Coordinator –

DOCLINE 2.0 - Microsoft Internet Explorer

Address: http://docline.gov/docline/login.cfm

DOCLINE® Help | FAQ | Contact Us | Preferences | Log Out

Home | Requests | Serial Holdings | **Institutions** | Loansome Doc Patrons

Search | Add | Manage Users | Manage Groups | Update MAUMAS

Update > Services & Fees [Back to Results](#) **SAVE** **RESET**

MAUMAS - University of Massachusetts Medical Center

Address
People
Membership
Services & Fees
ILL Services
Copy Services and Fees
Loan Services and Fees
Loansome Doc Services
Other Services
DOCLINE Options

ILL Services required field = *

Participates in EFTS ☒ Yes ☐ No
Date Joined EFTS 01-24-1996 MM-DD-YYYY
Provides Color Copies ☐ Yes ☒ No
Fills Rush Request ☒ Yes ☐ No
Service Comments

Copy Services and Fees

Copy Base Fees

Borrower Group	Base Fee	Comments
MAHSLIN	\$	Fees vary. Participants agree to invoice and pay electronically through EFTS.
RESOURCE	\$	
EFTS	\$	

Section 22 Modifying Copy Service Options and Fees

STEP	ACTION: Modify Copy Service Options / Fees
1	On the DOCLINE navigation bar, select Institutions .
2	On the DOCLINE sub navigation bar, select Update <LIBID> where <LIBID> is your institution's LIBID.
View	Your library's institution record is displayed.
3	Click Services & Fees on the Institution Navigation bar.
4	Click Copy Services and Fees on the Institution Navigation bar. -or- Scroll down to the <i>Copy Services and Fees</i> area.
View	The library groups your library is a member of will display with their associated charges and comments. Direct questions or changes about library groups to your RML.
5	Modify your base fee charge for reciprocal ILL partners and enter any comments.
6	Modify your base fee charge for other ILL borrowers and enter any comments.
7	Add any surcharges your library adds to its base fee for specific services or conditions. Select the surcharge type from the pull down list and click Add Surcharge . Enter the surcharge amount and explanatory comments. For example "2 hour service, Mon-Fri 8am – 3pm EST"
8	Indicate whether your library provides copy service to international libraries by checking the Yes or No radio button. If you select Yes , indicate to which countries you provide service. If you choose Selected Countries, press Add/Delete Countries. Select the countries served in the Countries popup window and click Save .
9	Click Save .

Section 22 Modifying Copy Service Options -[cont'd]

To change Copy Base Fees, add the appropriate numbers to the dollar fields and click **Save** –

DOCLINE - Microsoft Internet Explorer
 Address: http://docline.gov/docline/login.cfm
 Help | FAQ | Contact Us | Preferences | Log Out

Home | Requests | Serial Holdings | **Institutions** | Loansome Doc Patrons

Search | Add | Manage Users | Manage Groups | Update MAUMAS

Doc Services
 Other Services
 DOCLINE Options

Delivery Info

Will receive by:

Mail - Yes
Fax - Yes
 1-508-856-5899

Ariel - Yes
 Primary - 146.189.226.13

Email (PDF) - No

Copy Services and Fees

Copy Base Fees

Borrower Group	Base Fee	Comments
MAHSLIN	\$	
RESOURCE	\$	Fees vary.
EFTS	\$	Fees vary. Participants agree to invoice and pay electronically through EFTS.
Reciprocal Partner	\$	
Other ILL	\$ 11.00	50 page limit

Copy Surcharges

Surcharge Type	Surcharge	Comments
Fax	\$ 19.00	
Select Value		

Sends Copies to International Libraries?

To add Copy Surcharges, click the **Value** drop-down list box, select a value, and click **Add Surcharge** –

DOCLINE - Microsoft Internet Explorer
 Address: http://docline.gov/docline/login.cfm
 Help | FAQ | Contact Us | Preferences | Log Out

Home | Requests | Serial Holdings | **Institutions** | Loansome Doc Patrons

Search | Add | Manage Users | Manage Groups | Update MAUMAS

Copy Surcharges

Surcharge Type	Surcharge	Comments
Fax	\$ 19.00	
Select Value		

Add Surcharge

Sends Copies to International Libraries?

Books

Will Loan: ☐ Yes ☒ No Base Fee: Loan Period:

Comments: No audiovisual loans

Section 23 Modifying Loan Service Options and Fees

STEP	ACTION: Modify Loan Service Options/Fees
1	On the DOCLINE navigation bar, select Institutions .
2	On the DOCLINE sub navigation bar, select Update <LIBID> where <LIBID> is your institution's LIBID.
View	Your library's institution record is displayed.
3	Click Services & Fees on the Institution Navigation bar.
4	Click Loan Services and Fees on the Institution Navigation bar. -or- Scroll down to the <i>Loan Services and Fees</i> area.
5	For Audio/Visual, Books, and Journals, indicate whether or not your library will loan these material types by checking either Yes or No . <ul style="list-style-type: none"> • If Yes, indicate whether your library will renew loans for these material types. • If Yes to Loans, indicate your library's base fee and loan period. • If Yes to Renewals, indicate your library's renewal period.
6	For Audio/Visual, Books, and Journals, enter any comments explaining services and/or fees.
7	Add any surcharges your library adds to its base fee for specific services or conditions. Select the surcharge type from the pull down list and click Add Surcharge . Enter the surcharge amount and explanatory comments. For example "2 hour service, Mon-Fri 8am – 3pm EST".
7	Indicate whether your library provides loan service to international libraries by checking the Yes or No radio button. If you select Yes, indicate to which countries you provide service. If you choose Selected Countries, click Add/Delete Countries . Select the countries served in the Countries popup window and click Save .
8	Click Save .

Section 23 Modifying Loan Service Options -[cont'd]

To change Loan Services and Base Fees, add to the appropriate fields and click **Save** –

DOCLINE - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Address http://docline.gov/docline/login.cfm Go

DOCLINE® Help | FAQ | Contact Us | Preferences | Log Out

Home Requests Serial Holdings **Institutions** Loansome Doc Patrons

Search Add Manage Users Manage Groups Update MAUMAS

Loan Services and Fees

Loan Services and Base Fees

Audio/Visual

Will Loan: ☐ Yes ☒ No Base Fee: Loan Period:

Comments: No audiovisual loans

Books

Will Loan: ☒ Yes ☐ No Base Fee: Loan Period: Will Renew: ☐ Yes ☒ No

\$ 11.00 35 days days

Comments:

Journals

Will Loan: ☐ Yes ☒ No Base Fee: Loan Period:

Comments: No loans

Loan Surcharges

Surcharge Type Surcharge Comments

To add Loan Surcharges, click the **Value** drop-down list box, select a value, and click **Add Surcharge** –

DOCLINE - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Address http://docline.gov/docline/login.cfm Go

DOCLINE® Help | FAQ | Contact Us | Preferences | Log Out

Home Requests Serial Holdings **Institutions** Loansome Doc Patrons

Search Add Manage Users Manage Groups Update MAUMAS

record

\$ 11.00 35 days days

Comments:

Journals

Will Loan: ☐ Yes ☒ No Base Fee: Loan Period:

Comments: No loans

Loan Surcharges

Surcharge Type Surcharge Comments

Select Value

Select Value

Citation Verification / Correction

International

Out of State/Region

For Profit Organization

Rush

Add Surcharge

Loansome Doc Services

Loansome Doc Provider: ☒ Yes ☐ No

Section 24 Modifying Loansome Doc Service Options

STEP	ACTION: Modify Loansome Doc Service Options
1	On the DOCLINE navigation bar, select Institutions .
2	On the DOCLINE sub navigation bar, select Update <LIBID> where <LIBID> is your institution's LIBID.
View	Your library's institution record is displayed.
3	Click Services & Fees on the Institution Navigation bar.
4	Click Loansome Doc Services on the Institution Navigation bar. -or- Scroll down to the <i>Loansome Doc Services</i> area.
5	Indicate whether your library is a Loansome Doc provider by checking Yes or No .
6	Indicate to which user populations your library provides Loansome Doc service by checking the box under <i>Provides</i> (Checked = Yes).
7	Indicate whether your library charges for Loansome Doc service for each of the user populations by checking the box under <i>Charges</i> (Checked = Yes).
8	Enter comments about your institution's Loansome Doc services.
9	If your library provides service to users residing in an international country, indicate to which countries you provide service. If you choose Selected Countries, click Add/Delete Countries . Select the countries served in the Countries popup window and click Save .
10	Click Save .

Section 24 Modifying LD Service Options -[cont'd]

To change Loansome Doc Services, check the appropriate boxes and click **Save** –

Loansome Doc Services

Loansome Doc Provider ☒ Yes ☐ No

(Check All That Apply)

	Provides	Charges
Affiliated Users	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Unaffiliated Health Professionals	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Public	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
International Libraries	<input type="checkbox"/>	<input type="checkbox"/>
International Users	<input type="checkbox"/>	<input type="checkbox"/>

Loansome Doc Comments

Serves International Users Who Reside In:
☐ All Countries ☒ Selected Countries

Add/Delete Countries

Other Services

To add Other Services, check the appropriate boxes and click **Save** –

Other Services

Authorizes listing in MEDLINEplus [Consumer Health Libraries Directory](#)
☒ Yes ☐ No

(Check All That Apply)	For Affiliated Users		For Unaffiliated Health Professionals		For Public	
	Provides	Charges	Provides	Charges	Provides	Charges
Internet Training	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Mediated Searching	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Onsite Collection Access	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Online Search Training	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Reference Services	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Comments

Last Modified on: 12-12-2003 11:12

SAVE RESET

NAUMAS
 University of Massachusetts Medical Center :: The Lamar Soutter Library/ ILL DEPT.

Section 25 Modifying Library Service Options

STEP	ACTION: Modify Library Service Options
1	On the DOCLINE navigation bar, select Institutions .
2	On the DOCLINE sub navigation bar, select Update <LIBID> where <LIBID> is your institution's LIBID.
View	Your library's institution record is displayed..
3	Click Services & Fees on the Institution Navigation bar.
4	Click Other Services on the Institution Navigation bar. -or- Scroll down to the <i>Other Services</i> area.
5	Indicate whether your library provides the listed services for each of the user populations (Checked = Yes).
6	Indicate whether your library charges for each listed service for each of the user populations by checking the box under <i>Charges</i> (Checked = Yes).
7	Enter comments about your institution's library services.
8	Click Save .

Section 26 Setting Defaults to Route New Requests

STEP	ACTION: Set Default Values for Borrow Requests
1	On the DOCLINE navigation bar, select Institutions .
2	On the DOCLINE sub navigation bar, select Update <LIBID> where <LIBID> is your institution's LIBID.
View	Your library's institution record is displayed.
3	Click DOCLINE Options on the Institution Navigation bar.
4	Select the default <i>Form</i> of your requests: Copy, Color Copy, or Original (Loan).
5	Select the default method of <i>Copyright Compliance</i> : Guidelines or Law.
6	Enter the default <i>Maximum Cost</i> willing to be paid for ILL material. Enter a numeric value. If you need the material free of cost, enter "0.00". Select "Any cost" if your library is willing to pay any amount for ILL material.
7	Enter the default authorization for ILL material in the <i>Authorized by</i> field.
8	Select the default <i>Network Delivery Method</i> .
9	Select the default <i>NLM Delivery Method</i> .
10	Enter the default <i>Comments to Lenders</i> to display on DOCLINE Receipts.
11	In the <i>Serial Routing</i> area, indicate the default routing instructions for serials including your <i>Routing Table Default Cells</i> , whether to <i>Route to Resource Libraries</i> , whether to <i>Route to NLM</i> , and whether to <i>Route Beyond NLM</i> .
12	Click Save .

Section 26 Setting Defaults to Route Requests - [cont'd]

To change Borrowing Preferences, fill in the appropriate information and click **Save** –

The screenshot shows the DOCLINE web interface in a Microsoft Internet Explorer browser window. The address bar shows <http://docline.gov/docline/login.cfm>. The page title is "DOCLINE". The navigation bar includes links for Home, Requests, Serial Holdings, Institutions (selected), Loansome Doc Patrons, Search, Add, Manage Users, Manage Groups, and Update MAUMAS. The main content area is titled "Update > DOCLINE Options" with a "Back to Results" link and "SAVE" and "RESET" buttons. Below this is the "MAUMAS - University of Massachusetts Medical Center" header. A sidebar on the left contains links for Address, People, Membership, Services & Fees, DOCLINE Options (selected), Borrowing Preferences, Delivery Methods, and Additional Software. The "Borrowing Preferences" section includes a "required field = *" note and a "Select borrowing and routing preferences for new requests." instruction. The form fields are: Form (Copy), Copyright Compliance (Guidelines), Maximum Cost (\$22.00) OR ☐ Any cost, Authorized By (empty), Network Delivery Method (Mail), NLM Delivery Method (Mail), and Comments to Lenders (empty). Below the form is the "Serial Routing" section with a "Routing Table Default" header and a table of 8 columns, each with a checkbox. The first column is checked. The status bar at the bottom shows "Done" and "Internet".

DOCLINE Options

MAUMAS - University of Massachusetts Medical Center

required field = *

Borrowing Preferences

Select borrowing and routing preferences for new requests.

Form

Copyright Compliance

Maximum Cost \$ OR ☐ Any cost

Authorized By

Network Delivery Method

NLM Delivery Method

Comments to Lenders

Serial Routing

Routing Table Default

<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
-------------------------------------	--------------------------	--------------------------	--------------------------	--------------------------	--------------------------	--------------------------	--------------------------

To change Serial Routing Options: click the appropriate boxes and radio buttons, then click **Save** –

DOCLINE 2.0 - Microsoft Internet Explorer

Address: http://docline.gov/docline/login.cfm

DOCLINE

Help | FAQ | Contact Us | Preferences | Log Out

Home | Requests | Serial Holdings | **Institutions** | Loansome Doc Patrons

Search | Update MAUMAS

Serial Routing

Routing Table Default

1	<input checked="" type="checkbox"/>	2	<input checked="" type="checkbox"/>	3	<input checked="" type="checkbox"/>	4	<input checked="" type="checkbox"/>	5	<input checked="" type="checkbox"/>	6	<input checked="" type="checkbox"/>	7	<input checked="" type="checkbox"/>	8	<input checked="" type="checkbox"/>
Cells	<input checked="" type="checkbox"/>	9	<input checked="" type="checkbox"/>												

Refer to Resource Libraries ☒ Yes ☐ No

Route to NLM ☒ Yes ☐ No

Route Beyond NLM ☒ Yes ☐ No

[Edit Routing Table](#)

Monographs, Audiovisuals, and Non-NLM Journal Routing

1)	
2)	
3)	
4)	
5)	

[Edit M/A/N Map](#)

Done Internet

Section 26 Setting Defaults to Route Requests - [cont'd]

At the current time, there are no Additional Software Options available. Future systems development at the National Library of Medicine will include the implementation of DOCLINE interfaces to third party ILL management software packages, based on the ISO/ILL protocol.

DOCLINE - Microsoft Internet Explorer

Address: http://docline.nlm.gov/docline/login.cfm

Help | FAQ | Contact Us | Preferences | Log Out

Home | Requests | Serial Holdings | Institutions | Loansome Doc Patron | Search | Add | Manage Users | Manage Groups | Update MAUMAS

Worcester, MA 01655-0001
[Edit Settings](#)

Send by:

Mail :Yes

Ariel	<input type="radio"/> Yes <input type="radio"/> No	Email	<input type="radio"/> Yes <input type="radio"/> No	Web	<input type="radio"/> Yes <input type="radio"/> No
FAX	<input type="radio"/> Yes <input type="radio"/> No	PDF	<input type="radio"/> Yes <input type="radio"/> No	TIFF	<input type="radio"/> Yes <input type="radio"/> No

Additional Software Options

ISO/ILL Protocol: No
Third Party Products:

[Add/Delete Products](#)

Last Modified on: 03-27-2001 09:03

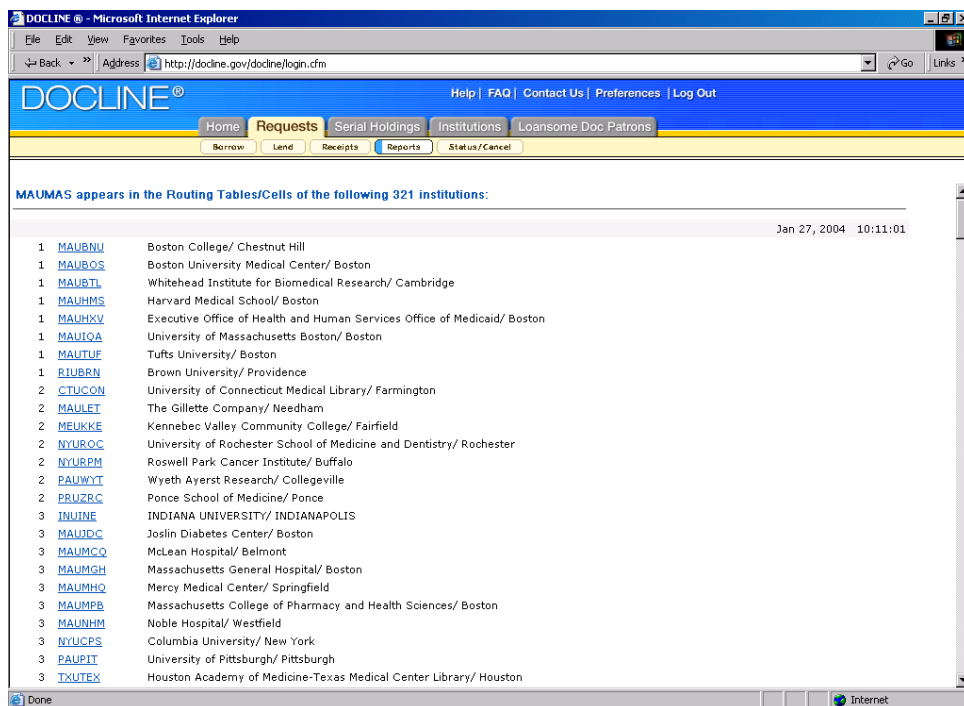
[SAVE](#) [RESET](#)

MAUMAS
University of Massachusetts Medical Center :: The Lamar Soutter Library/ ILL DEPT.

Section 27 Viewing Institutions With You in Their Routing Table

STEP	ACTION: Viewing "Routing Table Statistics" Report
1	On the DOCLINE navigation bar, select Requests .
View	Your library's list of available reports is displayed.
2	Click on the <i>Routing Table Statistics</i> link.

For example, according to the latest *Routing Table Statistics* Report, there are 321 institutions that have the Regional Library (Lamar Soutter) in their Routing Table –



Section 28 Modifying Delivery Methods

STEP	ACTION: Modify Delivery Methods
1	On the DOCLINE navigation bar, select Institutions .
2	On the DOCLINE sub navigation bar, select Update <LIBID> where <LIBID> is your institution's LIBID.
View	Your library's institution record is displayed.
3	Click DOCLINE Options on the Institution Navigation bar.
4	Click Delivery Methods on the Institution Navigation bar. -or- Scroll down to the <i>Delivery Methods</i> area.
5	In the <i>Receive</i> by area, indicate by which delivery methods your library can receive ILL material.
6	Enter a delivery address for each Receive by delivery method .
7	In the <i>Send</i> by area, indicate which delivery methods your library can receive.
8	Click Save .

To change Delivery Methods: click the appropriate radio buttons, enter the appropriate information, and click **Save** –

The screenshot shows the DOCLINE 2.0 web application in a Microsoft Internet Explorer browser window. The address bar shows the URL <http://docline.gov/docline/login.cfm>. The page has a blue header with the DOCLINE logo and navigation links: Home, Requests, Serial Holdings, Institutions (selected), Loansome Doc Patrons, Help, FAQ, Contact Us, Preferences, and Log Out. Below the header is a yellow navigation bar with buttons: Search, Add, Manage Users, Manage Groups, and Update MAUMAS. The main content area is titled "Delivery Methods" and contains a "Receive by:" section. This section has two rows of radio buttons for "Ariel" and "FAX", each with options for "Yes" and "No" for "Email", "PDF", "Web", and "TIFF". Below these are input fields for "Ariel Address" (containing "146.189.226.13"), "Alternate Ariel Address", and "Email Address" (with a note "(For Email & Web)"). There is also a "FAX" field with a "Country Area Number" label. At the bottom, the "Document Delivery (Mail)" section is filled with the text: "University of Massachusetts Medical Center The Lamar Soutter Library/ ILL DEPT. 55 Lake Avenue North Worcester, MA 01655-0001". The browser status bar at the bottom shows "Done" and "Internet".

DOCLINE® Help | FAQ | Contact Us | Preferences | Log Out

Home Requests Serial Holdings **Institutions** Loansome Doc Patrons

Search Add Manage Users Manage Groups Update MAUMAS

Delivery Methods

Receive by:

Mail : **Yes**

Ariel ☐ Yes ☐ No Email ☐ Yes ☐ No PDF ☐ Yes ☐ No Web ☐ Yes ☐ No PDF ☐ Yes ☐ No

FAX ☐ Yes ☐ No Email ☐ Yes ☐ No TIFF ☐ Yes ☐ No Web ☐ Yes ☐ No TIFF ☐ Yes ☐ No

Ariel Address

Alternate Ariel Address

Email Address (For Email & Web)

FAX Country Area Number

Document Delivery (Mail) **University of Massachusetts Medical Center The Lamar Soutter Library/ ILL DEPT. 55 Lake Avenue North Worcester, MA 01655-0001**

Section 29 Updating Your Routing Table

The Routing Table is the grouped list of institutions to which your serial requests will route, if the library reports owning the request volume or year and supports the requested delivery method. The institutions listed are your primary lending partners.

The Routing Table is comprised of nine (9) cells, each of which can contain up to twenty (20) libraries. The order of routing is sequential from Cell 1 through Cell 9. All libraries within a cell are evaluated for routing a request before the routing algorithm moves to the next cell of libraries. Routing within a cell is random to provide a degree of load balancing. Since routing within a cell is random, institutions are displayed in alphabetical order in the Routing Table. There is no "position" **within** a cell which determines routing order.

The Workspace is a holding area for institutions being added or moved as libraries work on modifying their Routing Table over a period of time.

Strategies for setting up Routing Tables vary from region to region

For cells 1 through 3: Use these for consortia members and local libraries for which you have a reciprocal borrowing/lending agreements. Cell 1 should be reserved for libraries with fewer than 100 titles in SERHOLD, and cells 2 and 3 for libraries with between 100-200 titles in SERHOLD. Place heavily utilized libraries of a consortium in cells 2 and 3, allowing DOCLINE to search the smaller institutions first. If you are a member of BHSL, the suggested cell placement for Level 2 BHSL is cell 2; for Level 3 BHSL, cell 3; and so forth. Cell 1 is for your local consortium and Level 1 BHSL libraries (i.e., libraries that have not submitted statistics for the previous year.)

For cells 4 through 6: Use these for non-consortium members with which you have a reciprocal agreements or libraries with more than 300 titles in SERHOLD. . If you are a member of BHSL, the suggested cell placement for Level 4 BHSL is cell 4; for Level 5 BHSL, cell 5; and so forth.

For cells 7 and 8: Use these for specialized libraries and Resource Libraries, placing those in geographic proximity to your institution in cell 7. For BHSL, Level 7 libraries should be placed in cell 7, before the placement of Resource Libraries. Unless they are in your local consortium Level 8, BHSL libraries should be prefixed only and should be used for unique materials.

For cell 9: Use this cell for very large Resource Libraries.

Your DOCLINE coordinator can provide valuable guidance for managing your Routing Table.

Section 29 Updating Your Routing Table -[cont'd]

STEP	ACTION: Add Lending Libraries
1	On the DOCLINE navigation bar, select Institutions .
2	On the DOCLINE sub navigation bar, select Update <LIBID> where <LIBID> is your institution's LIBID.
View	Your library's institution record is displayed.
3	Click DOCLINE Options on the Institution Navigation bar.
4	Click the Edit Routing Table link on the Institution Navigation bar. -or- Click Edit Routing Table in the <i>Serial Routing</i> area of the DOCLINE Options page.
View	Your "Proposed" Routing Table and its associated Workspace displays. The Proposed tab allows you to edit your Routing Table and consists of your Routing Table currently in use by DOCLINE for routing plus any changes you have made (additions, deletions, moves). The Workspace contains any libraries which you have added from Institution Search, added via <i>Add to Workspace</i> on this page, or previously moved from the current Routing Table .
5	(Optional) In the <i>Add to Workspace</i> area, enter a valid LIBID and press Add . The institution is added to the Workspace.
6	In the Proposed Routing Table, click on the numbered tab corresponding to the cell to which you want to add an institution. In the Workspace: select the library or libraries to add to that cell by checking the box next to the institution name. Click the left pointing arrow pointing from the Workspace to the Routing Table -or- In the Workspace: select the library or libraries to add by checking the box next to the institution name. Select "Move to Cell #" from the list box and click Go .
7	To add more institutions, repeat Steps 5-6.
8	Click Save .
9	Click Request Approval once all changes have been made. This notifies your RML to review your Routing Table changes. The message "Routing table is awaiting approval" will appear in your Activity and Status area of the Home page.

Section 29 Updating Your Routing Table -[cont'd]

STEP	ACTION: Move Lending Libraries
1	On the DOCLINE navigation bar, select Institutions .
2	On the DOCLINE sub navigation bar, select Update <LIBID> where <LIBID> is your institution's LIBID.
View	Your library's institution record is displayed.
3	Click DOCLINE Options on the Institution Navigation bar.
4	Click the Edit Routing Table link on the Institution Navigation bar. -or- Click Edit Routing Table in the <i>Serial Routing</i> area of the DOCLINE Options page.
View	Your "Proposed" Routing Table and its associated Workspace displays. The Proposed tab allows you to edit your Routing Table and consists of your Routing Table currently in use by DOCLINE for routing plus any changes you have made (additions, deletions, moves). The Workspace contains any libraries which you have added from Institution Search, added via <i>Add to Workspace</i> on this page, or previously moved from the current Routing Table.
5	In the Proposed Routing Table, click on the cell number which contains the institution to be moved.
6	Select the institution(s) to be moved by clicking the checkbox next to the institution name.
7	In the Proposed Routing Table, select "Move to Cell #" from the list box and click Go .
8	To move additional libraries, repeat Step 5-7.
9	Click Save .
10	Click Request Approval once all changes have been made. This notifies your RML to review your Routing Table changes. The message "Routing table is awaiting approval" will appear in your Activity and Status area of the Home page.



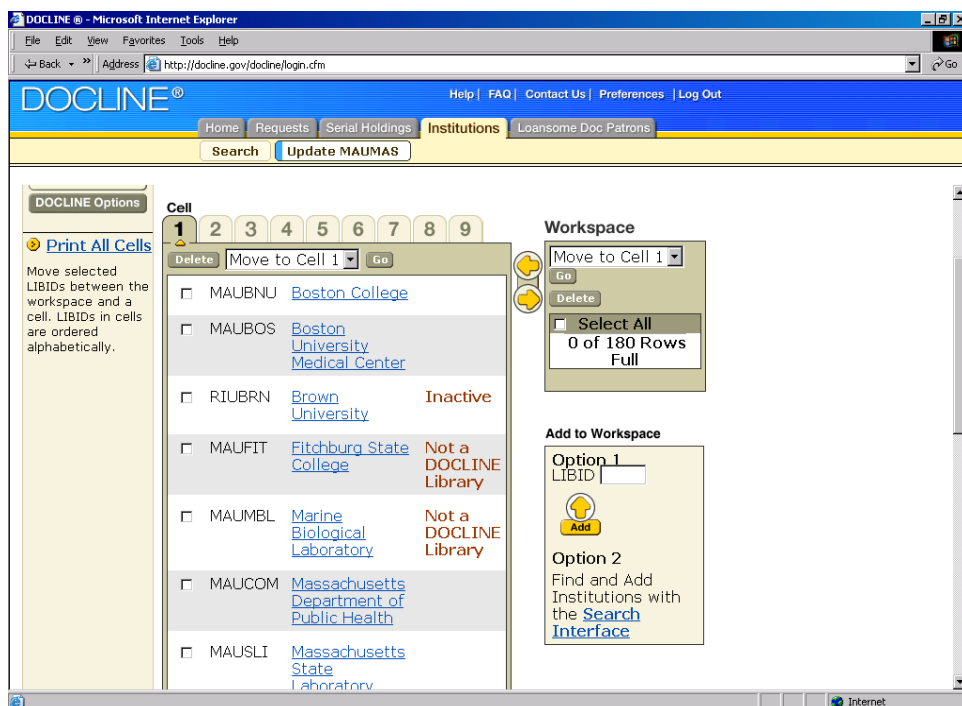
Tip: Institutions can be moved into the Workspace for later use. Just as with the Routing Table, remember to **Save** when adding, deleting, or moving libraries into or out of the Workspace before leaving the *Update Routing Table* page.

Section 29 Updating Your Routing Table -[cont'd]

STEP	ACTION: Remove Lending Libraries
1	On the DOCLINE navigation bar, select Institutions .
2	On the DOCLINE sub navigation bar, select Update <LIBID> where <LIBID> is your institution's LIBID.
View	Your library's institution record is displayed.
3	Click DOCLINE Options on the Institution Navigation bar.
4	Click the Edit Routing Table link on the Institution Navigation bar. -or- Click Edit Routing Table in the <i>Serial Routing</i> area of the DOCLINE Options page.
View	Your "Proposed" Routing Table and its associated Workspace displays. The Proposed tab allows you to edit your Routing Table and consists of your Routing Table currently in use by DOCLINE for routing plus any changes you have made (additions, deletes, moves). The Workspace contains any libraries which you have added from Institution Search, added via <i>Add to Workspace</i> on this page, or previously moved from the current Routing Table .
5	In the Proposed Routing Table, click on the cell number which contains the institution to be removed.
6	Select the institution(s) to be deleted by clicking the checkbox next to the institution name.
7	Click the right pointing arrow to move the institution to the Workspace for later use -or- Click Delete .
8	To remove additional libraries, repeat Step 5-7.
9	Click Save .
10	Click Request Approval once all changes have been made. This notifies your RML to review your Routing Table changes. The message "Routing table is awaiting approval" will appear in your Activity and Status area of the Home page.

Section 29 Updating Your Routing Table -[cont'd]

To edit the Routing Table, you can navigate by Route A (Institutions | Update xxxxxx | Edit Settings Edit Routing Table) –or– by Route B (Institutions | Update xxxxxx | DOCLINE Options | Serial Options) –



Notes:

- Even though you have saved changes to your Routing Table by clicking **Save**, changes do not actually take effect in Production until your DOCLINE Coordinator at the RML approves them.
- A message on your Home page will alert you that your Routing Table is under review. Once approval has occurred, the message on your Home page will be removed.
- Click on the Proposed, Current, and Compare tabs to take a less far-sighted, “forest” view of your table.

Section 29 Updating Your Routing Table -[cont'd]

STEP	ACTION: View Routing Table Changes
1	On the DOCLINE navigation bar, select Institutions .
2	On the DOCLINE sub navigation bar, select Update <LIBID> where <LIBID> is your institution's LIBID.
View	Your library's institution record is displayed.
3	Click DOCLINE Options on the Institution Navigation bar.
4	Click the Edit Routing Table link on the Institution Navigation bar. -or- Click Edit Routing Table in the <i>Serial Routing</i> area of the <i>DOCLINE Options</i> page.
View	Your "Proposed" Routing Table and its associated Workspace displays. The Proposed tab allows you to edit your Routing Table and consists of your Routing Table currently in use by DOCLINE for routing plus any changes you have made (additions, deletions, moves). The Workspace contains any libraries which you have added from Institution Search, added via <i>Add to Workspace</i> on this page, or previously moved from the current Routing Table.
5	Click on Current tab.
View	The Compare tab displays the difference between your Routing Table currently in use by DOCLINE for routing and your "Proposed" Routing Table which contains your changes.

Click the **Compare** tab to view changes that occur between **Proposed** and **Current** –

DOCLINE @ - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address http://docline.gov/docline/login.cfm

DOCLINE® Help | FAQ | Contact Us | Preferences | Log Out

Home Requests Serial Holdings Institutions Loansome Doc Patrons

Search Update MAUMAS

Update > DOCLINE Options > Routing Table [SAVE](#) [REQUEST APPROVAL](#) [RESET](#)

» MAUMAS - University of Massachusetts Medical Center

Address Routing Table [Back to Results](#)

People

Membership

Services & Fees

DOCLINE Options

[Print All Cells](#)

Move selected LIBIDs between the workspace and a cell. LIBIDs in cells are ordered alphabetically.

Proposed Current Compare

The compare view shows the pending changes to your serial Routing Table.

No differences found

Last Modified on: 12-06-2003 12:12

[SAVE](#) [REQUEST APPROVAL](#) [RESET](#)

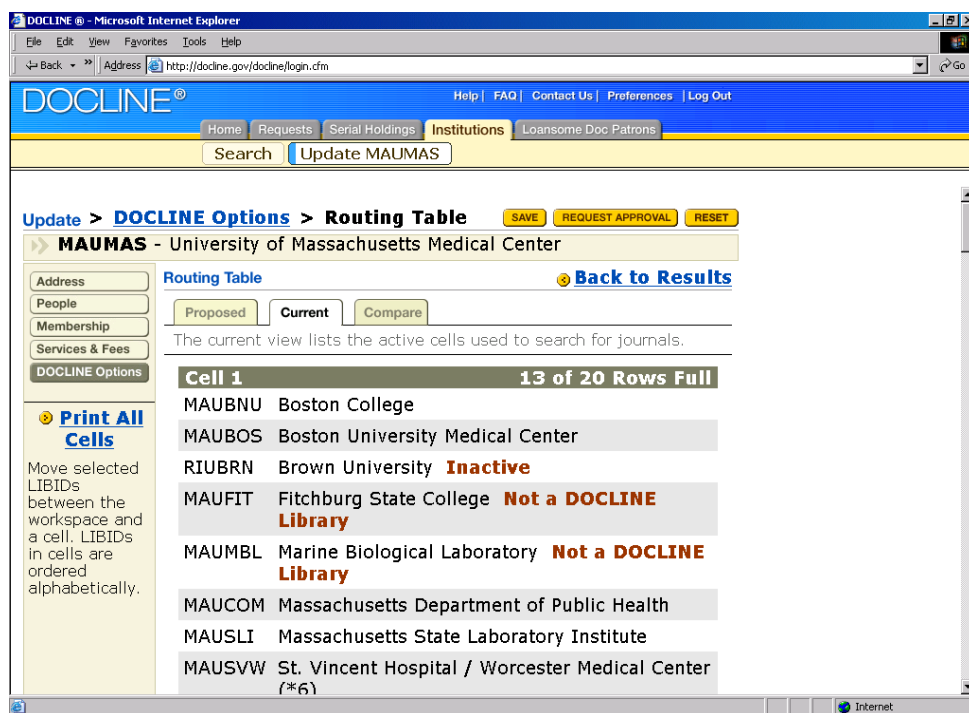
MAUMAS

Internet

Section 29 Updating Your Routing Table -[cont'd]

STEP	ACTION: View Current Routing Table
1	On the DOCLINE navigation bar, select Institutions .
2	On the DOCLINE sub navigation bar, select Update <LIBID> where <LIBID> is your institution's LIBID.
View	Your library's institution record is displayed.
3	Click DOCLINE Options on the Institution Navigation bar.
4	Click the Edit Routing Table link on the Institution Navigation bar. -or- Click Edit Routing Table in the <i>Serial Routing</i> area of the <i>DOCLINE Options</i> page.
View	Your "Proposed" Routing Table displays. The Proposed tab allows you to edit your Routing Table and consists of your Routing Table currently in use by DOCLINE for routing plus any changes you've made (additions, deletes, moves). The Workspace contains any libraries which you've added from Institution Search, added via Add to Workspace on this page, or previously moved from the current Routing Table .
5	Click the Current tab.
View	The Current tab displays the Routing Table currently in use by DOCLINE for routing.

Click the **Current** tab to view the entire Routing Table as it now exists in production –



Section 29 Updating Your Routing Table -[cont'd]

STEP	ACTION: Print Routing Table
1	On the DOCLINE navigation bar, select Institutions .
2	On the DOCLINE sub navigation bar, select Update <LIBID> where <LIBID> is your institution's LIBID.
View	Your library's institution record is displayed.
3	Click DOCLINE Options on the Institution Navigation bar.
4	Click the Edit Routing Table link on the Institution Navigation bar. -or- Click Edit Routing Table in the Serial Routing area of the <i>DOCLINE Options</i> page
5	Click on the Print All Cells link.
View	Your library's current Routing Table is displayed.
6	Print via your browser's printing function (File, Print).
7	Close the Print window.

Cell 1		13 of 20 Rows Full
MAUBNU	Boston College	
MAUBOS	Boston University Medical Center	
RIUBRN	Brown University	Inactive
MAUFIT	Fitchburg State College	Not a DOCLINE Library
MAUMBL	Marine Biological Laboratory	Not a DOCLINE Library
MAUCOM	Massachusetts Department of Public Health	
MAUSLI	Massachusetts State Laboratory Institute	
MAUSVW	St. Vincent Hospital / Worcester Medical Center (*6)	
MAUTUF	Tufts University	
MAUTIV	Tufts University School of Veterinary	

Section 29 Updating Your Routing Table -[cont'd]



Notes:

- You will NOT be permitted to enter your own LIBID – it will be rejected by the system!
- Don't mix apples with oranges – "charge-free" and "charge-fee" lending libraries should never be stored within the same routing cell.
- You have a total maximum of 180 slots spread out over 9 cells; there is no need to fill them all.
- There's a random algorithm at work behind the scenes. Remember it does not matter where libraries fall within a particular cell -- an automatic search proceeds hierarchically **across** cells, **not within** them.
- Remove problem libraries: whether it is due to understaffing or other difficulties. Sometimes libraries cannot offer the rapid service needed and expected by others. If you find that your requests frequently sit unacknowledged at a specific library before routing onward, you may want to remove them from your Routing Table. You can always add them back at a later date.
- Reduce your reliance on "prefixing":
 - let DOCLINE identify which libraries own the correct journal title and volume

- if you're frequently prefixing requests, you may want to make changes to your Routing Table
- Your Routing Table is the key to efficient use of the DOCLINE system.

Section 30 Updating Your M/A/N Map

The M/A/N Map is an ordered list of institutions to which your monographic, audio/visual, and journal titles not in NLM's OPAC requests will route. The institutions listed are generally your primary lending partners. The M/A/N Map is comprised of nine (9) rows. The order of routing is sequential from Row 1 through Row 9.

The Workspace is a holding area for institutions being added or moved as libraries work on modifying their M/A/N Map over a period of time.

STEP	ACTION: Add Lending Libraries
1	On the DOCLINE navigation bar, select Institutions .
2	On the DOCLINE sub navigation bar, select Update <LIBID> where <LIBID> is your institution's LIBID.
View	Your library's institution record is displayed.
3	Click DOCLINE Options on the Institution Navigation bar.
4	Click the Edit M/A/N Map link on the Institution Navigation bar -or- Click Edit M/A/N Map in the <i>Monographs, Audiovisuals, and Non-NLM Journal Routing</i> area of the <i>DOCLINE Options</i> page.
View	The M/A/N Map and its associated Workspace displays. The Workspace contains any libraries which you've added from Institution Search, added via <i>Add to Workspace</i> on this page, or previously moved from the M/A/N Map.
5	(Optional) In the <i>Add to Workspace</i> area, enter a valid LIBID and click Add . The institution is added to the Workspace.
6	In the Workspace, select the library or libraries to add to the M/A/N Map by checking the box next to the institution name. Click the arrow pointing from the Workspace to the M/A/N Map. The institutions are added to the bottom of the ordered list in order by LIBID -or- In the Workspace: select one (1) library to add by checking the box next to the institution name; select "Move to Row #" from the list box and click Go . The institution is inserted at that row position. Institutions are automatically reordered, moving each institution down one row.
7	To add more institutions, repeat Step 6.
8	Click Save .

Strategies for setting up an M/A/N Map vary from region to region. Your DOCLINE coordinator can provide valuable guidance for managing your M/A/N Map.

Section 30 Updating Your M/A/N Map -[cont'd]

STEP	ACTION: Move Lending Libraries
1	On the DOCLINE navigation bar, select Institutions .
2	On the DOCLINE sub navigation bar, select Update <LIBID> where <LIBID> is your institution's LIBID.
View	Your library's institution record is displayed.
3	Click DOCLINE Options on the Institution Navigation bar.
4	Click the Edit M/A/N Map link on the Institution Navigation bar —or— Click Edit M/A/N Map in the <i>Monographs, Audiovisuals, and Non-NLM Journal Routing</i> area of the <i>DOCLINE Options</i> page.
View	The M/A/N Map and its associated Workspace displays. The Workspace contains any libraries which you've added from Institution Search, added via Add to Workspace on this page, or previously moved from the M/A/N Map.
5	In the M/A/N Map, select a library to move within the M/A/N Map by checking the box next to the institution name.
6	Select "Move to Row #" from the list box and click Go . Institutions are automatically reordered, moving the other institutions in the list up or down.
7	To move additional institutions, repeat Steps 5-6.
8	Click Save .

Section 30 Updating Your M/A/N Map -[cont'd]

STEP	ACTION: Remove Lending Libraries
1	On the DOCLINE navigation bar, select Institutions .
2	On the DOCLINE sub navigation bar, select Update <LIBID> where <LIBID> is your institution's LIBID.
View	Your library's institution record is displayed.
3	Click DOCLINE Options on the Institution Navigation bar.
4	Click the Edit M/A/N Map link on the Institution Navigation bar. -or- Click Edit M/A/N Map in the <i>Monographs, Audiovisuals, and Non-NLM Journal Routing</i> area of the <i>DOCLINE Options</i> page.
View	The M/A/N Map and its associated Workspace displays. The Workspace contains any libraries which you've added from Institution Search, added via Add to Workspace on this page, or previously moved from the M/A/N Map.
5	In the M/A/N Map, select the library or libraries to delete from the M/A/N Map by checking the box next to the institution name.
6	Click the right pointing arrow to move the institution to the Workspace for later use. -or- Click Delete . Institutions are automatically reordered, moving each library up.
7	To move additional institutions, repeat Steps 5-6.
8	Click Save .



Notes:

- If your institution utilizes OCLC for all monographic borrowing, it is **NOT** necessary to fill in an M/A/N map.
- The first cell in your M/A/N Map should contain your primary lenders of monographs, audiovisuals, and non-serial titles (usually a large Resource Library with an extensive collection.)

Section 31. Laudable Links

- **NN/LM-NER Web Site:**

<http://www.nlm.gov/ner/DocumentDelivery.html>

- **NN/LM Online HOLD Request Form:**

<http://nlm.gov/libinfo/DOCLINE/dochold.html>

- **NLM Web Site (DOCLINE Help):**

http://www.nlm.nih.gov/docline/doclinehelp/%21SSL%21/WebHelp/DOCLINE_Help.htm

- **NLM Web Site (DOCLINE FAQ's):**

<http://www.nlm.nih.gov/services/faqdocline.html>

END OF MODULE

